



How to Manually Shortlist Candidates

This Guide is for Hiring Managers

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Walsall Council

Oracle Recruiting

Guidance – Shortlisting

Important: Please note that Walsall Council's Recruitment and Selection Policy stipulates that all panel members should have completed the council's recruitment and selection training and unconscious bias training; the panel chair must have completed both.

Recruitment & Selection Policy

Recruitment & Selection Guidance

You can access Recruitment guidance, links to policies, procedures, guides and useful forms on our [SharePoint site](#)



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**Step
Number**
1

Step Description

Sign into
OneSource.

Step Image

ORACLE Cloud

English ▼

Sign in

Username

Password

[Forgot Password?](#)

Next

Or

 Sign in with Walsall SSO

[Need help signing in?](#)

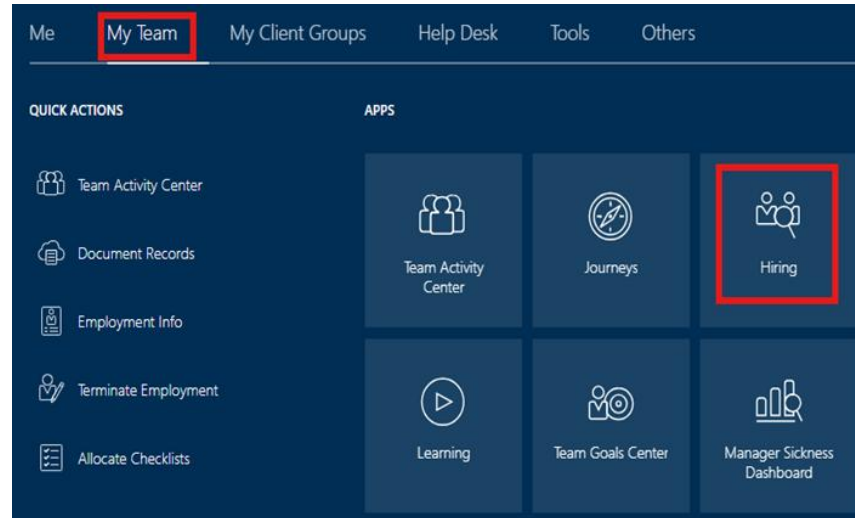
Notes:

There is no need to enter a username or password, simply click the 'Sign in with Walsall SSO' option.

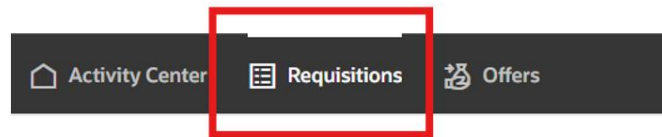


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- 2 Click **My Team** and then **Hiring**



- 3 Click on **Requisitions** at the bottom of the page



This will take you to your requisitions page, where you can view all of your current vacancy requisitions.



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- 4 Click on the title of the requisition you wish to shortlist for.

Job Requisitions

Search by requisition title, number, or description

Q

Phase

State

Hiring Manager

Recruiter

Hiring Team Role Recruiter, Hiring Manager, Collaborator

X

Location

Filters

Clear (1)

1 results

+ Create

Requisition Title	Requisition Number	Requisition Status	Phase	State	New Applications	Applications	Prospects	Actions
Children and Family Supp	825	Draft - In Progress	Draft	In Progress	0	0	0	...

- 5 To view your applicants, click on the number of applications.
i.e. “23”

Overview			
Overview	Details	Job Formatting	Interviews
Activity overview			
Shortlisting - To be shortlisted	22	Active Applications	23
Unconfirmed Applications	0	Referred Prospects	0
		Hires Out of 2	0



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6 Applicants for your vacancy will be listed.

Job Applications

Keywords

Show Filters

Application Details

Active

☐

Actions

View

Sort By

Candidate	Details	Status	Education	Experience
☐ ☒ ***** 1367534 Wolverhampton, West Midlands, GB		Shortlisting, To be shortlisted Prescreening score: 0 out of 0		Drains Engineer, MetroRod, 01/04/2023 - Present IT Production and Image Capture Specialist, Restore PLC, 01/10/2014 - 31/03/2023
☐ ☒ ***** 1367509 Tamworth, Staffs, GB		Shortlisting, To be shortlisted Prescreening score: 0 out of 0	GCSE	Gardener, O&L services, 01/01/2023 - 31/01/2024
☐ ☒ ***** 1368959 WALSALL, WEST MIDLANDS, GB		Shortlisting, To be shortlisted Prescreening score: 0 out of 0	BA - Bachelor of Arts, The University of Wolverhampton Level 3 Diploma, Walsall College	Entertainer, Woolacombe bay holiday park, 01/02/2024 - 30/11/2024 General assistant, Wilko, 01/07/2022 - 30/09/2023

Important Note: Candidate names are hidden until the interview stage to prevent bias. You'll see asterisks (*) and a candidate number instead. Use the candidate number in all shortlisting communications.

7

You may notice at this stage that some candidates are marked as **Shortlisting Verification Required** under the **Status** list

☐	*****	Shortlisting, Verification Required	GCSE, Ormiston Shelffield Community Academy	Bin Loader, Opus People Solution/Walsall Council, 01/07/2025 - Present
1367057		Prescreening score: -1 out of 0	GCSE, Ormiston Shelffield Community Academy	
WALSALL, WEST MIDLANDS, GB			GCSE, Ormiston Shelffield Community Academy	Packer/Final Production, Impalloy, 01/02/2023 - 30/06/2025
			(3 more)	Ground Maintenance, Jack Moody, 01/03/2021 - 31/01/2023
				(4 more)

This tells us that the candidate has answered one of the pre-screening questions with a response that requires our attention

The pre-screening questions are as follows:

- **Are you eligible to work in the United Kingdom?**
If the applicant selects 'no', you should shortlist as normal. Seek advice if necessary.
- **Disabled Applicants (including Neurodivergent)** - The council offers a guaranteed interview scheme for candidates with a disability as defined under the Equality Act (2010), who evidence in their completed application form that they meet the criteria as detailed on the employee specification for the post and who advise the council of their disability at the time of their application. This is in accordance with the Disability Confident scheme.
- **Care Leavers/ Care Experienced** – The council offers a guaranteed interview scheme for applicants who inform the council at the time of application that they are a Walsall Council care leaver / care experienced and who evidence in their completed application form that they meet the criteria as detailed on the employee specification for the post.
- **Armed Forces Community Covenant** – any candidate who has formerly served in the Armed forces and who meets the essential criteria will be guaranteed an interview.
- **Do you have any unspent convictions, cautions, reprimands or warnings?**
If the applicant selects 'yes' you will be alerted here as there may be implications on posts that require a DBS check.
- **Are you related to, or a close friend of, any elected member or employee of the organisation?**
If the candidate answers 'yes' – further investigation should be made to ascertain if they have a friend or relation who is involved in the recruitment to this role.
- **Are you subject to a redeployment process?**
Important Note: this question is asked of internal candidates (Walsall Council employees)



only. If a candidate answers 'yes' to this question, their application should be considered before others when shortlisting as per the [Redeployment Procedure](#). See below section 'Redeployees' for more information.

8

To find out more about how candidates have responded to these questions, click on the asterisks for the candidate you wish to view – this will take you to their application details.

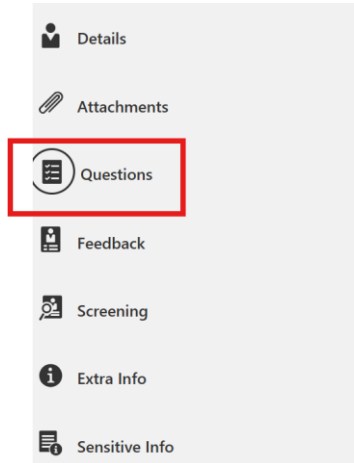
☐	<div>*****</div> <div>1367057</div> <div>WALSALL, WEST MIDLANDS, GB</div>	Shortlisting, Verification Required	GCSE, Ormiston Shelffield Community Academy	Bin Loader, Opus People Solution/Walsall Council, 01/07/2025 - Present	...
		Prescreening score: -1 out of 0	GCSE, Ormiston Shelffield Community Academy	Packer/Final Production, Impalloy, 01/02/2023 - 30/06/2025	
			GCSE, Ormiston Shelffield Community Academy	Ground Maintenance, Jack Moody, 01/03/2021 - 31/01/2023	
			(3 more)	(4 more)	



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Next click on the **Questions** tab on the left hand side of the page.



This will then display the candidate responses to the questions, including the responses that require attention.



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In this example the candidate has indicated that they meet all guaranteed interview scheme criteria.

Do you have a disability?

Yes

-1 points

Are you neurodivergent?

Yes

-1 points

Care leavers / care experienced - Walsall Council will guarantee an interview for any candidate who is a Walsall Council care leaver or care experienced individual, who meets the employee specification criteria for the job (and who inform us of this at the time of their application through the below declaration). If you are a Walsall Council care leaver or care experienced and ticked yes, please provide further details in your supporting information.

Yes

-1 points

Armed Forces Community Covenant - Walsall Council will guarantee an interview for any candidate who has formerly served in the UK Armed Forces and who meets the employee specification criteria (and who inform us of this at the time of their application through the below declaration). If you have formerly served in the UK Armed Forces and tick yes, please provide further details in your supporting information.

Yes

-1 points

Please provide detailed SUPPORTING INFORMATION that demonstrates how your skills, abilities and experience meet the essential criteria set out in the employee specification for this role. Your SUPPORTING INFORMATION will be used by hiring managers to decide whether you will be invited to interview. You can copy and paste information from a WORD document (or similar) into this section, up to approximately 4 pages. Please note that we do not accept CV's. (Maximum 12,000 characters).

Test

Are you eligible to work in the United Kingdom?

You can check that you have the correct Right to Work by reviewing <https://www.gov.uk/prove-right-to-work>

Yes

0 points

Do you have any unspent convictions, cautions, reprimands or warnings?

Self-declaration of suitability to work in posts requiring a Disclosure and Barring Service Check Where the post involves working with children, other vulnerable groups or in a position of trust it is exempt from the provisions of the Rehabilitation of Offenders Act 1974 which means you must disclose details of unfiltered convictions including reprimands, formal warnings and cautions (for guidance on the filtering of convictions see here: <https://www.gov.uk/government/publications/filtering-rules-for-criminal-record-check-certificates>). Any information given will be treated as confidential and will be considered only in relation to posts to which the order applies

No

0 points

Are you related to, or a close friend of, any elected member (councillor) or employee of the organisation?

Canvassing or failure to make proper disclosure may disqualify you for the appointment, and if appointed, shall render you liable to dismissal without notice.

No

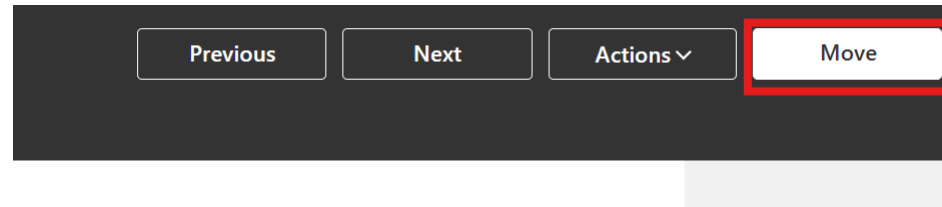
0 points

Please note, all guaranteed interview scheme questions will sit under this section of the candidate application. You will no longer be able to see disability on the shortlist.

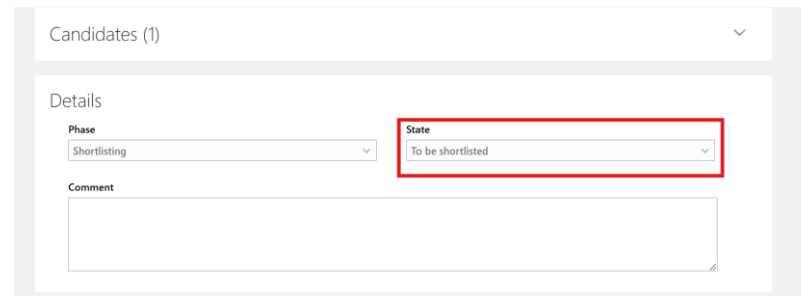


Once you have checked on the applicant's response, it is important to change their status from **Verification Required** to, **to be Shortlisted** so that they can be included in the recruitment process and moved correctly to the next stage along with other applicants.

- 11 To do this, select 'Move' at the top right of the screen whilst you are viewing the application details

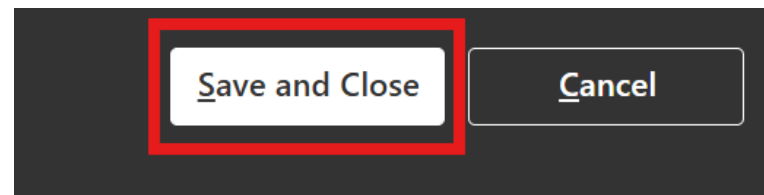


- 12 You will notice on the next screen that “state” has automatically been updated to **To Be Shortlisted**.



The screenshot shows a web form titled "Candidates (1)". Under the "Details" section, there are two dropdown menus. The first is labeled "Phase" and has "Shortlisting" selected. The second is labeled "State" and has "To be shortlisted" selected. This "State" dropdown is highlighted with a red rectangular box. Below these fields is a "Comment" text area.

- 13 Click ‘Save and Close’ at the top right of the screen to save this change



The screenshot shows a dark grey bar at the bottom of the screen containing two buttons. The button on the left is labeled "Save and Close" and is highlighted with a red rectangular box. The button on the right is labeled "Cancel".



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Redeployees:

If an internal candidate (Walsall Council employee) applies for a role, they will be asked the following screening question: **Are you subject to a redeployment process?**

Please see the information above on screening questions to understand how to view these responses.

If a candidate answers 'yes' to this question, **their application should be considered before others when shortlisting as per the [Redeployment Procedure](#).**

Please note that it is your responsibility as hiring manager to check each application form. There are occasions when an applicant may incorrectly answer that they are a redeployee when they are not, please contact the Recruitment Team before considering any redeployee application, to ensure that the applicant is currently registered for Redeployment.



- 14 To find out if the candidate has requested for any reasonable adjustments, click on the asterisks which anonymise the applicant's name, this will take you into their application.

Job Applications

Keywords

Show Filters

Application Details

Active

☐ Actions

Shortlisting View Create Date - New to

Candidate	Details	Candidate Notes	Status	Disability Declared
☐ *****			Shortlisting, To be shortlisted Prescreening score: 0 out of 0	No Disability declared
☐ *****			Shortlisting, To be shortlisted Prescreening score: 0 out of 0	No Disability declared
☐ *****			Shortlisting, To be shortlisted Prescreening score: 0 out of 0	No Disability declared
☐ *****			Shortlisting, To be shortlisted Prescreening score: 0 out of 0	No Disability declared

- 15 Next click on **Extra Info**

Details

Attachments

Questions

Feedback

Screening

Extra Info

Sensitive Info

Application Extra Info

Application Extra Info Page Recruitment - Reasonable Adjustments

Reasonable Adjustment

Do you require a reasonable adjustment during the interview/ass...

If yes please provide details:

This section will display the details of the reasonable adjustments required (if any).



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Shortlisting:

When shortlisting, there are two options:

Option 1: Manual Shortlisting: You can manually shortlist with your panel and if you wish, use the Shortlisting, Rejection and Selection Form which can be found in the useful forms section of our [SharePoint site](#). We would recommend this option if you have a large number of applicants, as you will only need to complete one form. You and the recruitment panel can meet up and view the applicants together, then complete the form. Alternatively, you can shortlist individually then come together to agree the final shortlist.

You don't need to upload the shortlisting, rejection and selection form to the requisition on Oracle, but do make sure you save a copy in your files.

Once you have done this, follow the steps for '**Moving Applicants using Oracle Recruiting**' below.

Option 2: Shortlisting using Oracle Recruiting: If you have a small number of applicants, you may wish to use the Oracle Recruiting feedback form. Please be aware, however, that an individual shortlist form for each applicant will be sent to each member of the panel, and they will have to complete each form in turn. This could potentially mean, for example, that if you have 30 applicants, each member of the panel will receive 30 emails and will need to complete 30 forms. If there are 3 panel members, that will mean 90 forms will be returned to you!



16 To request feedback/shortlisting from panel members using oracle recruiting. Go onto your shortlist and select the applicants you wish to seek feedback for by **ticking the box** next to each applicant.

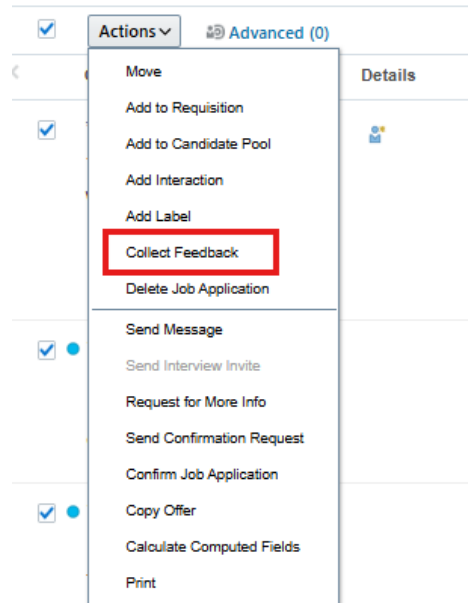
Job Applications

Keywords <input type="text"/>					
Show Filters Application Details Active x					
☒ Actions ☐ Advanced (0) <input type="text"/> View Summary Sort By Create Date - New to					
Candidate	Details	Status	Education	Experience	
☒ ***** 1361860 Walsall, West Midland, GB		Shortlisting, To be shortlisted Prescreening score: 0 out of 0	Level 3 Certificate, Fortray Global Level 3 Certificate, We are Group London BSc Degree FRST, University of Ado-Ekiti (1 more)	QC operative, Lifecycle Oil, 01/06/2025 - Present QC operative, Lifecycle oil, 01/06/2025 - Present Key production operative, Lifecycle Oil, 01/12/2024 - 31/05/2031 (4 more)	...
☒ ***** 1369145 BROWNHILLS, WEST MIDLANDS, GB		Shortlisting, To be shortlisted Prescreening score: 0 out of 0	Level 3 Diploma, South Staffordshire College General Certificate of Education (GCE - Ordinary Level), Brownhills Ormiston Academy	Volunteer, Chasewater railway, 01/06/2023	...
☒ ***** 1367509 Tamworth, Staffs, GB		Shortlisting, To be shortlisted Prescreening score: 0 out of 0	GCSE	Gardener, O&L services, 01/01/2023 - 31/01/2024	...

Tick the box at the top, to the left of **Actions** if you would like to tick all boxes in the shortlist.



- 17 Next, click on **Actions** and select **collect feedback** from the drop-down menu.



You will be taken to the **collect feedback** screen.



- 18 Next, under **select respondents**, select the collaborators you wish to include in shortlisting by ticking the box to their name. Next click **continue**.

The screenshot displays a web interface for selecting respondents. At the top, a progress bar shows five steps: 1. Candidates, 2. Select Respondents (active), 3. Select Interview Questionnaire, 4. Include Documents, and 5. Request Details. The 'Select Respondents' section includes an 'Add Respondent' dropdown menu with a red box around it, and a list of three respondents, each with a checkbox and a red box around the checkbox:

Respondent	Selected
JJ Julie Jones Head of Service 40	☐
JC John Cole Support Worker	☐
NS Neeta Surkante	☐

A 'Continue' button is located at the bottom right of the 'Select Respondents' section.

The list of collaborators you have already chosen when you set up the requisition will display here, but you can add more by typing the name of the officer into the **add respondent** box.



- 19 Select **interview questionnaire**, under the **add questionnaire** drop-down, select **WMBC shortlisting questionnaire**. When you have done this, click **continue**.

1 Candidates

Edit

2 Select Respondents

Edit

3 Select Interview Questionnaire

Add Questionnaire

Select a value

☒ Shortlisting Questionnaire

Questionnaire Code

WMBC_SHORTLISTING_QUESTIONNAIRE

Folder

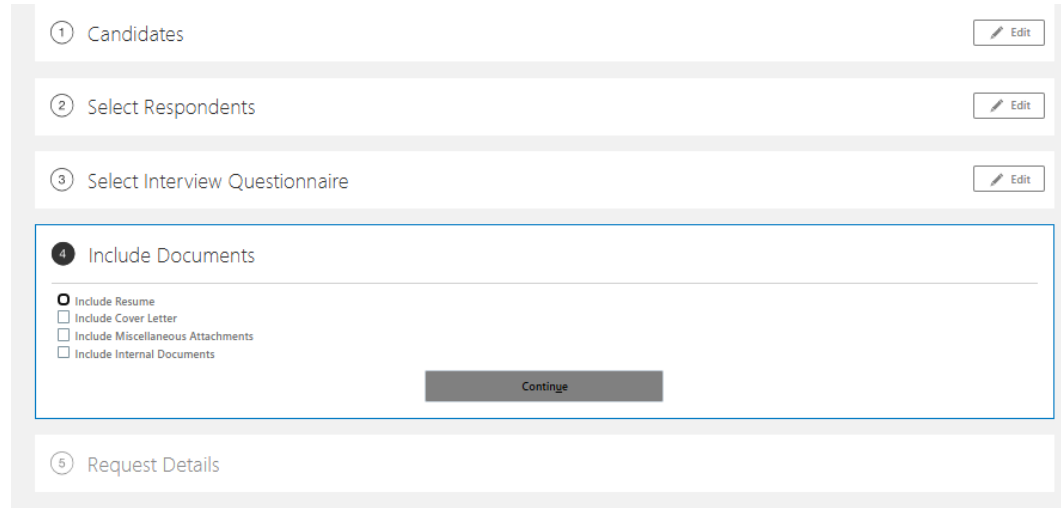
Interview Feedback

Continue

4 Include Documents

5 Request Details

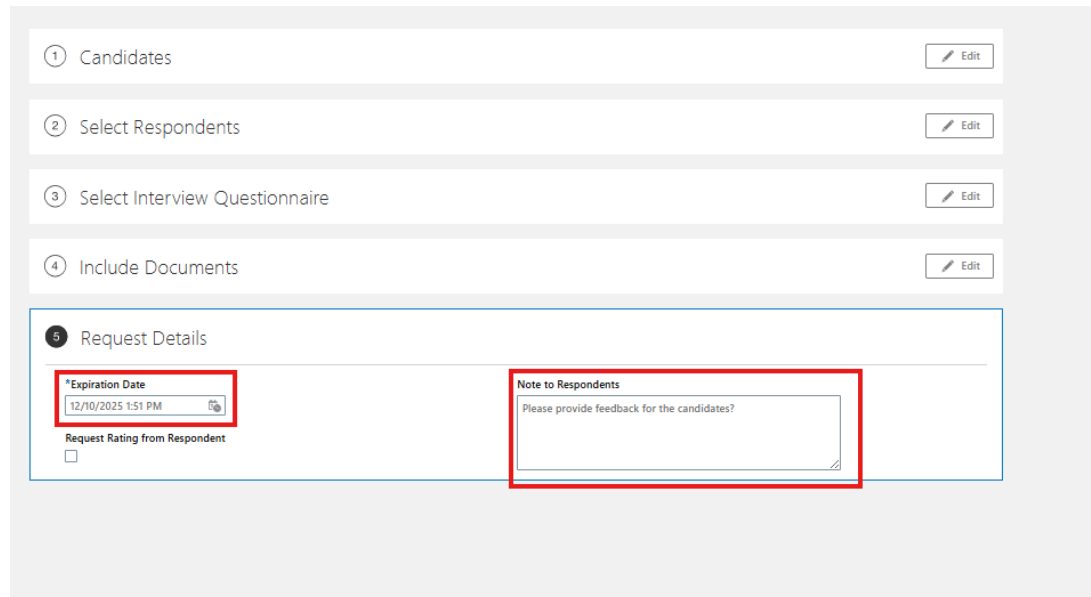
- 20 **Include Documents.** This section is not relevant to Walsall Council requisitions, please do not select any of the documents listed. Click **Continue**.



The screenshot shows a multi-step process with five steps: 1. Candidates, 2. Select Respondents, 3. Select Interview Questionnaire, 4. Include Documents, and 5. Request Details. Step 4 is currently selected and highlighted with a blue border. It contains a radio button for 'Include Resume' and three checkboxes for 'Include Cover Letter', 'Include Miscellaneous Attachments', and 'Include Internal Documents'. A 'Continue' button is at the bottom right of the step.

Use the **note to respondents** box to send a message to your panel members like in the example to the left.

- 21 On the **request details page**, you have the option to set a deadline date and time for when you wish for the panel to respond to you. To do this, click on the **expiration date drop-down** and select your required date and time, then click **'OK'**.



The screenshot shows the same five-step process, but now step 5, 'Request Details', is selected and highlighted with a blue border. It contains two main sections: 'Expiration Date' and 'Note to Respondents'. The 'Expiration Date' section has a date/time picker showing '12/10/2025 1:51 PM' and a calendar icon. The 'Note to Respondents' section has a text area with the prompt 'Please provide feedback for the candidates?'. Both sections are highlighted with red boxes. There is also a 'Request Rating from Respondent' checkbox.



- 22 Please do not tick/select the **request rating from respondent** as we do not score candidates at shortlisting stage.

- 23 Once you have completed the above, click **submit** at the top right of the page to send your request to the panel.

The screenshot shows a web interface with a dark blue header containing navigation icons. Below the header is a dark grey bar with two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red rectangular border. The main content area below is light grey.

The panel member will be taken to **interview feedback**, where they will need to answer yes or no to the **question is the candidate suitable for shortlisting?**



24 Before completing the form, the panel members should review the application forms on Oracle Recruiting. The panel members will receive both an email and a notification on One Source asking them to complete feedback. To do this, the panel member should click on the **submit feedback** link within the email/notification

FYI: Complete the recruitment questionnaire Shortlisting Questionnaire for...



ejti-test.fa.sender@workflow.email.uk-london-1.ocs.oracle

To Test Notification Inbox



14:11

Retention Policy Delete from Archive after 2 years (2 years)

Expires on 26/09/2027

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

CAUTION: STOP and THINK - This email originated from outside of the council. If it looks suspicious it probably is and YOU SHOULD NEVER enter your council username and password into an external link or open files attached to a suspicious email.

Hello Katrina Davey-Reid,

You have been asked to complete the following questionnaire.

Questionnaire: Shortlisting Questionnaire

Job Requisition: TEST FOR NOTIFICATIONS - Finance Business Partner - 866

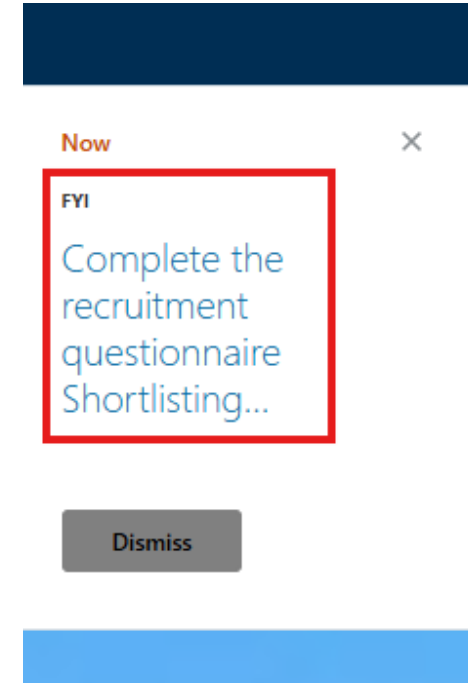
Candidate: 1097537

Expiration Date: 10/10/2025 2:11 PM Europe/London

Click the link to access the questionnaire:

[Submit Feedback](#)

Thank you.



Please note that more detailed notes regarding shortlisting and/or a shortlisting, rejection and selection form should also always be kept by the panel.



- 25 Use the drop-down menu to select yes or no. The panel member will also be able to summarise the reasons for shortlisting/ not shortlisting the candidate in the supporting notes section. Once they have done this, they should click submit at the top right of the page.

Interviewer Responses

Shortlisting Questionnaire

* Is the candidate suitable for shortlisting?

▼

Yes

No

General Information

Candidate
*****name

Requisition Title
TEST FOR NOTIFICATIONS - Finance Business Partner(866)

Interviewer Responses

Shortlisting Questionnaire

* Is the candidate suitable for shortlisting?

Yes

▼

* Please add some supporting notes for Shortlisting decision.

The candidate meets all requirements on the JDES.

This will display a list of the people feedback requests have been sent to, and whether or not these have been completed.

27 Once this has been submitted, you as the hiring manager will be able to view the feedback provided by the panel. To do this, select an applicant from the list by clicking on the asterisks.

Scores and Ratings

Shortlisting Questionnaire (WMBC_SHORTLISTING_QUESTIONNAIRE)

Score

0 out of 0 (1 respondent)

Feedback Requests

All

Shortlisting Questionnaire (WMBC_SHORTLISTING_QUESTIONNAIRE)			
KD	Katrina Davey-Reid	Completed	***
26/09/2025 2:16 PM		0 out of 0	

Further information from the panel member will then display.



- 28 To view further information, click on the ellipsis to the right of the panel members name and select **view feedback**.

Feedback Requests

All ▾

Shortlisting Questionnaire (WMBC_SHORTLISTING_QUESTIONNAIRE)

KD

Katrina Davey-Reid

Completed

26/09/2025 2:16 PM

0 out of 0

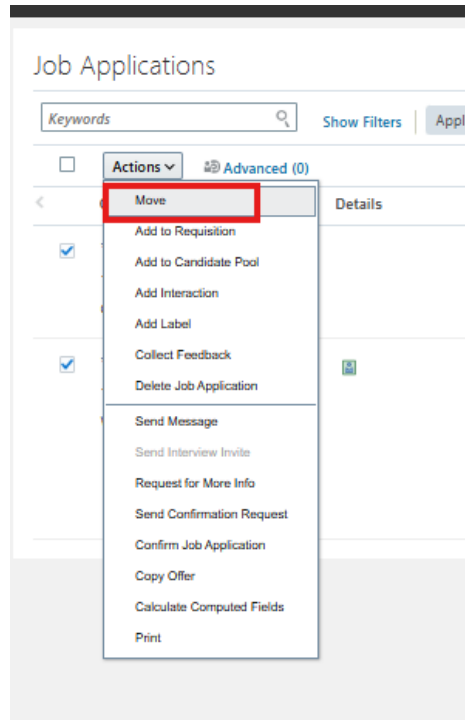
...
View Feedback
Delete Feedback

Note: Before you begin, make sure that all applicants are at **shortlisting, to be shortlisted** status. You can view this easily in the applicant list.

- 29 Now that you have shortlisted you will need to move your applicants to the correct stage in the Oracle Recruiting system.



- 30 For the applications that have been shortlisted select them by ticking the **tick-box** next to each applicant. When you have selected the applicants click **actions** and select **move** from the drop-down menu.



The phase **shortlisting** and state **to be shortlisted** should appear for your applicant(s).



- 31 At this stag, change the phase to 1st Interview and the state should automatically change to 1st Interview to be scheduled.

Candidates (2) ▼

Details

Phase
1st Interview

State
1st Interview to be Scheduled

Comment

If you wish, you can add any comments in the **comment box** at this stage, but completion of this box is not mandatory.

- 31 Click **save and close** at the top right of the page.

Save and Close **Cancel**

You will then be taken back to the list of applicants where you can see that the status of the shortlisted applicants has changed. You will also now be able to view the names of the applicants you have shortlisted.



- 32 For those applicants who have not been shortlisted select the relevant applicants by ticking the box next to applicant details.

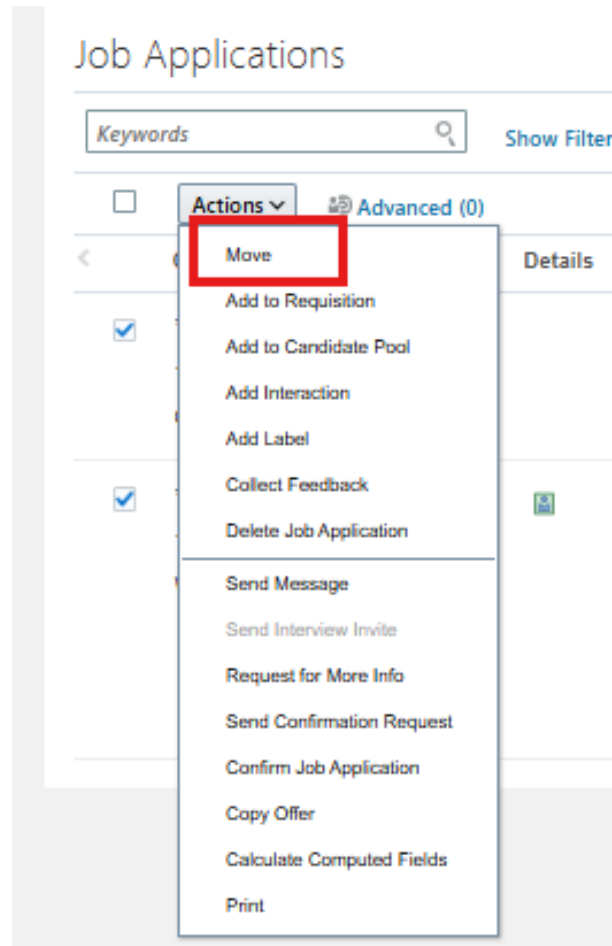
Job Applications

☐

<	Candidate	Details
☒	***** 1469872 GB	
☒	***** 10876 Walsall, GB	



- 33 Click **actions** and select **move** from the drop-down menu.



The phase 'Shortlisting' and state 'To be shortlisted' should appear for your applicant(s).



- 34 At this stage, change the **state** to **Rejected by Employer** using the drop-down menu.

Candidates (2) ▼

Details

Phase

Shortlisting ▼

State

Rejected by Employer ▼

Reason

▼

Comment

If you wish, you can also add any comments in the **comment box**, but completion of this box is not mandatory. Please note that applicants may be able to request access to this type of information and anything written in this box should be suitable reasons for rejection.



35

Next, you will need to select the reason that the applicants were not shortlisted. To do this, click on the drop-down menu under **reason** and select **does not meet the required criteria for the role**.

Candidates (2) ▼

Details

Phase

Shortlisting ▼

State

Rejected by Employer ▼

Reason

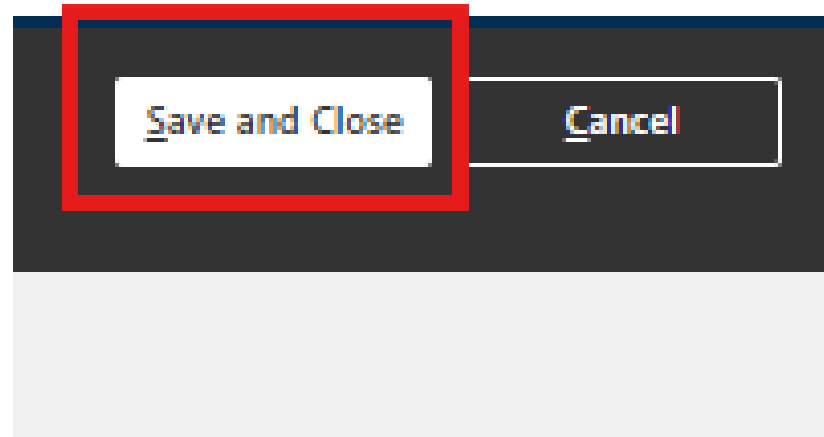
Did not meet the required criteria ▼

Comment



36

Click **save and close** at the top right hand of the page.



You will be taken back to the list of applicants, and you may notice that the rejected applicants are no longer showing in the list. This is because they are no longer active applicants – this is a filter automatically set by oracle.



- 37 If you wish to see all applicants (included the rejected applicants) click the 'x' next to the word **active** to remove this filter.

The screenshot shows the 'Job Applications' section of a web portal. At the top, there's a search bar labeled 'Keywords' with a magnifying glass icon. To its right are links for 'Show Filters', 'Application Details', and 'Active' (which is highlighted with a red box and has a small 'x' next to it). Below these are buttons for 'Actions' (with a dropdown arrow) and 'Advanced (0)'. On the right side, there are options for 'View' (set to 'Summary'), 'Sort By' (set to 'Create Date - New to'), and a 'View' button. In the center, there's a message: 'No results found. Check your search criteria' accompanied by a small icon of a person with a magnifying glass.

All applicants will then display. Please note: When you reject applicants using the process above, Oracle will send an automated rejection email to each applicant.

What happens next?

The next step is to agree an interview date and times with your panel and set up interviews for the shortlisted candidates. You can find out more about this in our next set of guidance notes: **Oracle Recruiting: Guidance – Interviews.**

Any Questions?

If you have any questions about this process, please check the guidance at [Training & Support](#) And [FAQ's](#) or contact the recruitment team by raising a help desk ticket through One Source.