TALENT ENGINEERING ACADEMY

Evidence-Led Candidate Screening

PRACTICE WORKBOOK

Screen consistently against essential criteria while distinguishing missing evidence from negative evidence.

PATHWAY	Assessment and Hiring Decisions
LEVEL	Practitioner
EDITION	2026.09
UPDATED	2026-09-24

Free learning. Practical work. Better recruitment.

An education initiative by Vitae.

WORKBOOK GUIDE

Build something useful as you learn.

This workbook turns the course into a practical piece of work you can review, refine and adapt. Print it, annotate it digitally, or use the prompts in your preferred notes tool.

YOUR COURSE DELIVERABLE

A screening guide with evidence categories and escalation questions.

How to use this workbook

01 Work through the course lessons in order, then complete the matching workbook prompts.

02 Use fictional or properly authorised information. Do not add candidate or client confidential data.

03 Compare your decisions with the self-review guidance. Revise assumptions, gaps and unclear ownership.

04 Keep the finished workbook as evidence of your learning and as a starting point for real work.

BEFORE YOU START

Talent Engineering Fundamentals, or equivalent recruitment experience.

Course page: https://talentengineering.org/courses/candidate-screening

PART 1

Plan your course deliverable.

Use these planning pages to define what you are producing before you work through the lesson exercises. Return to them as your thinking develops.

WORKSHEET 01

Essential criteria and justification

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 02

Evidence available and source

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 03

Evidence gaps versus contrary evidence

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 04

Consistent follow-up questions

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 05

Decision and reviewer

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 06

Candidate communication

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

PART 2

Apply each lesson.

Each exercise is designed to turn the lesson into evidence of practice. Complete the task, then use the guidance to challenge your first answer.

LESSON 01 / 04

Agree the screening contract

YOUR PRACTICE TASK

Write screening rules for three essential and two preferred criteria in a fictional brief.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A maintenance role requires experience diagnosing industrial equipment faults. The screening guide accepts examples from several industries and asks for clarification where a CV lists only a broad technician title.

SELF-REVIEW GUIDANCE

Each rule should explain the evidence needed and the next action when it is absent. Avoid automatic rejection for a preference or for a CV that uses unfamiliar terminology.

LESSON 02 / 04

Extract evidence without embellishment

YOUR PRACTICE TASK

Annotate five fictional CV statements with evidence, inference and a clarification question.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A CV says supported a quality audit. The screener records participation and asks which findings or actions the candidate owned. It does not upgrade the phrase into led all regulatory audits.

SELF-REVIEW GUIDANCE

Keep the candidate’s actual contribution visible. Label uncertain ownership and avoid translating an employer’s success into the individual’s achievement without support.

LESSON 03 / 04

Run a consistent screening conversation

YOUR PRACTICE TASK

Create a six-question screening guide and one candidate-information checklist.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

Every candidate is asked whether the confirmed shift pattern works for them. The recruiter does not ask about childcare or assume that a parent cannot work the pattern.

SELF-REVIEW GUIDANCE

Questions should elicit examples or confirm actual role conditions. Include a closing explanation of timing and the next decision. Avoid questions about irrelevant personal circumstances.

LESSON 04 / 04

Review borderline and rejected cases

YOUR PRACTICE TASK

Review four fictional borderline records and write a calibration note.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A reviewer finds that one screener rejects adjacent-industry applicants while another progresses them. The team clarifies the transferability rule and rechecks affected cases rather than averaging the two screeners' pass rates.

SELF-REVIEW GUIDANCE

Identify the exact criterion disagreement, the revised interpretation and which earlier decisions need reconsideration. Record uncertainty where further evidence is still required.

FINAL REVIEW

Strengthen the work before you use it.

Review the completed workbook as one connected piece of work. The strongest deliverables are internally consistent, explicit about limitations and clear about who decides what happens next.

- [ ] The work distinguishes facts, evidence, assumptions and open questions.
- [ ] Decisions have named owners, dates and review points.
- [ ] Measures connect to the outcome rather than activity alone.
- [ ] Risks, accessibility needs, privacy considerations and limitations are visible.
- [ ] The next action is specific enough for another person to follow.
- [ ] The finished deliverable can be explained in plain language.

FINAL CHANGES AND NEXT ACTIONS

FURTHER READING

Continue with trusted sources.

These sources support further study. A reference does not imply endorsement. Check the current official rules and obtain appropriate professional advice for real legal, financial or regulated decisions.

CIPD: Selection methods

Professional context for selection methods and their limitations.

https://www.cipd.org/uk/knowledge/factsheets/selection-factsheet/

GOV.UK: Discrimination in recruitment

UK legal context. Obtain advice for your jurisdiction and circumstances.

https://www.gov.uk/employer-preventing-discrimination/recruitment

ABOUT THIS WORKBOOK

Original educational scenarios. Practical work is self-directed and is not independently assessed. Adapt any method to your context with appropriate review.

Talent Engineering Academy is an education initiative by Vitae.