Pre-screening

Completing pre-screen checks

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The first task that all applications start with is **Pre-Screening** and this is to ensure that we have all the relevant information needed to progress an application. These include Personal Statement, References, Qualifications and Contact Details. All checks must be **passed** before the application can advance through the process. This merely confirms that each of the checks have been carried out even if we require further information, such as a second reference.

We also have a series of **Clearance Checks** that we can use to monitor the information we have requested. Please note that the do not influence the workflow and can be updated at any time.

Once you have selected the application to view you need to check that all information required is available. If an application is missing any information that required contacting the applicant we can e-mail them through Connect, part of the Campus Management (formerly Hobsons) system. You can record details of what is outstanding by using the **Task Notes** section at the bottom of the screen and clicking **Store** to save the note.

Confirm received personal statement
Task Notes

You can set each of the Pre-screen checks to one of the options listed which are **Not Checked, Pending Check, Failed Check** and **Passed Check** by using the radio buttons.

PRE-SCREEN			

Pre-screen checks (based on UDF on the MCR record)			
References *	○ Not checked	◉ Pending check	○ Failed check	○ Passed check
Qualifications *	○ Not checked	○ Pending check	○ Failed check	◉ Passed check
Contact Details *	○ Not checked	○ Pending check	○ Failed check	◉ Passed check
ALL	○ Not checked	○ Pending check	○ Failed check	○ Passed check

If you are waiting for information from the applicant, you can hold the record at Pre-screen, by not passing all the checks and clicking **Store**. A message will appear asking you to **Confirm changes to Pre-Screen checks** by clicking on the **Confirm** button.

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By clicking on the confirm button the changes are saved on the system immediately, on the applicant record. The workflow will then take you back to the main page showing the **Containers**, ready for you to process another application.

By clicking back into Pre-screening you will notice that the envelope icon for that application has been set back to closed, to indicate that further action needs to be taken. You can also add clearance checks on this screen if needed. Please refer to **021 HOW-TO GUIDE** for details on how to do this.

Once all pre-screen checks have been carried out you will need to set all of them to **Passed check**, click **Store**, and then confirm the next stage of the process required**,** so that the workflow will trigger and move the application to the next stage. You can see further information on what happens with these in **022 HOW-TO GUIDE**.