Standard Operating Procedure (SOP): Eligibility Criteria Assessment and Shortlisting

This SOP details the process for **eligibility criteria assessment and shortlisting**, encompassing the evaluation of candidate qualifications, experience verification, compliance with job requirements, and application screening. The aim is to ensure a fair and efficient selection of suitable candidates by applying predefined eligibility standards and systematically shortlisting applicants for subsequent recruitment stages.

1. Purpose

To outline a structured approach for assessing candidate eligibility and shortlisting applicants for further recruitment stages.

2. Scope

This SOP applies to all recruitment processes conducted by the **[Organization/Department Name]** for any open positions.

3. Responsibilities

- **HR Team:** Initial screening and documentation.
- **Hiring Manager:** Final eligibility review and shortlist approval.
- **Recruitment Panel:** Oversight to ensure fairness and compliance.

4. Definitions

- **Eligibility Criteria:** Minimum qualifications, experience, skills, and attributes required.
- **Shortlisting:** Selecting a subset of applicants who meet eligibility for further screening.

5. Procedure

1. **Preparation**
   - Define and document the eligibility criteria as per the job description.
   - Establish a screening matrix or checklist (see section 6.1).
2. **Collection of Applications**
   - Receive and acknowledge all applications before the deadline.
3. **Initial Screening**
   - Check each application for completeness (CV, cover letter, required documents).
   - Eliminate incomplete or late applications.
4. **Eligibility Assessment**
   - Assess qualifications, experience, and other criteria against the screening matrix.
   - Document the results for each applicant.
5. **Shortlisting**
   - Shortlist candidates who fully meet or exceed eligibility criteria.
   - Where possible, rank shortlisted candidates based on desired criteria.
6. **Approval and Communication**
   - Submit shortlist to the Hiring Manager for final review and approval.
   - Inform shortlisted applicants regarding the next steps.
7. **Documentation and Record Keeping**
   - Retain assessment sheets, shortlisting matrices, and records for audit purposes.

6. Screening Matrix/Checklist Example

Criteria	Requirement	Met (Yes/No)	Remarks
Education	Bachelor's degree in relevant field		
Experience	Minimum 3 years		

Key Skills	As specified in JD		
Certifications	Desired/Required		

7. References

- Job Description Document
- Company Recruitment Policy
- Applicable labor laws/regulations

8. Review and Update

This SOP must be reviewed annually or as required based on changes to recruitment policy or applicable regulations.