

SECTION 5

Screening the Applicants

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Screening the Applicants

As a person choosing to self-direct your personal assistance (PA) supports and services you are ready to meet the applicants from which you can choose your new PA. There are several ways you could have gotten to this step. Let's take a look.

You may have used the Job Description Development Tool you found in Appendix C to figure what tasks you wanted done and if you needed a paid PA, natural supports, or assistive technology. You wrote a job description based on the tasks. You chose a payroll agent. You created an ad and identified a job application for your applicants to use.

Actually, because self-direction is based on your choices and your comfort level you may have taken each of the steps described or none of them. Preparing to meet applicants could be the first step you've chosen to do. No matter. Our advice is the same. Screen your applicants.

Pre-Screening for Interviews

Your first contact with applicants will probably be a telephone call. Using the telephone to speak with applicants for the first time is a good way to pre-screen them. To do this, you explain the job tasks on your job description. Doing this helps the applicant decide if this is a job they think they would like.



For example, if you say: "I have a house cat" and the applicant says: "I can't be in a house with a cat. I'm allergic to cats," you'll both know this is not a good match for your job. If, on the other hand, the applicants says, "No problem, I love cats," you'll ask your next question.

Using this question and answer method during your first conversation

with an applicant will help you quickly find out which applicants do not fit your requirements. In the long run, you'll save yourself time and money. You may want to use the Finding the Right PA - Personal Preferences Assessment Worksheet included in this Toolkit in Section 2, Developing Your Job Description, to help you target exactly what you are looking for in a PA.

NOTE: It is illegal to ask people certain questions which provide information you can use to discriminate against people due to things like age and health. You can ask people if they are able to perform specific tasks such as bending, lifting, driving, etc. It is smart to think of the most physically demanding things you will expect an assistant to do and then ask them if they are able to do it as frequently as needed.

In Section 6 – Interviewing and Selecting Your PA, you'll find a list of interview questions you can and should ask.

Next we'll look at some guidelines or tips for telephone screening for you to think about as you plan how you will conduct your first conversation with applicants. Following the list of guidelines, you'll find a sample script that may clear up any questions you still have.



Guidelines for Telephone Screening

Act quickly.

Call people back as soon as possible. Good people find jobs quickly.

Be pleasant.

This is common sense, but it bears repeating: Be friendly and pleasant on the phone.

Provide some basic information about the job.

- Write a list of job tasks so that you are giving the same information to every person that calls.
- If there are specific things an assistant **MUST** have – like a current driving license and “clean” record, ability to lift or move a certain amount of weight – ask these questions early. If the person is unable or unwilling to accommodate these “musts” thank them and move on.

- Let them know the needed amount of hours and days along with the hourly wage and start date.
- Tell people if you smoke or have pets, as this may eliminate some applicants.
- After giving them the basics, ask them if this sounds like the kind of job they would be interested in. If an applicant does not think this is the right job for them, this is a good time for them to say so. This is when you both can politely hang-up without wasting too much time.

Ask a few questions of the potential employees.

- Why are you interested in this kind of work?
- What experience or training do you have?
- Do you smoke?
- Occasionally, I might need you to work more hours, can you do that?

Be organized.

- Take notes. You can ask a friend to help you with this. Write down the names and phone numbers of everyone you talk to.
- You can set up a personal interview for good candidates when you talk with them, or you can call them back, after you have time to review all of your phone calls.

So, if you're confident about screening your applicants over the telephone, skip the next section: Sample Telephone Screening Script. If you still have a question or two, read on.

Sample Telephone Screening Script

Hi, my name is_____.

I am returning your call about the ad I posted for a personal assistant.

Before we decide when to schedule an interview, there are some questions I need to ask you.



Tip: Ask questions based on your list of job tasks that you absolutely have to have done by your PA. For example, if the PA must lift you, you might say: “I weigh about 130 pounds. One of the most physically demanding requirements of this job is that you be able to roll me over in bed and help me transfer from my chair to the toilet and back again. I cannot assist you at all. Can you do this?” If your PA will need to provide transportation for you, you may want to ask if the applicant has a current driver’s license.

I need someone to assist me with: (list the tasks/activities in your job description)

-
-
-
-

You may want to ask questions like: Have you ever driven a van or other big vehicle? Or I have a cat that stays inside. Is that a problem?

Write your questions here:

-
-
-
-

If you like the person's answers, you might use some of the following script or write your own.

Great, then let me tell you a little about myself. I am _____ years old and live in my own home in _____ (town). I am involved in lots of activities which require that I get up at _____ a. m. in order to be (at work or at meetings/ activities) by _____ a.m. I need someone to assist me with bathing.

-
-
-

Tip: Check again with the applicant to see if the tasks you need done are tasks they will do. If the applicant says this is not the job they were looking for, thank them and hang up. If not, ask them to tell you about themselves.

Tell me a little about yourself.

Tip: You'll need to know how much you are going to pay your PA.

I pay \$_____ an hour and withhold taxes as required by law.

Tip: If s/he asks not to have taxes taken out, say "I can't do that."

Be sure and tell the applicant what days and hours you want him or her to work. If the schedule is flexible be sure to find out if this will work for the applicant. If not, thank them and hang up.

You can write in your schedule here:

-
-
-

Be sure to ask:

When can you start?

Ask the applicant:

Does this sound like something you'd want to pursue?

Tip: Ask yourself if you think you would like this person and if you think you would get along. If yes, go ahead and schedule a face-to-face interview. Be sure you have their correct phone number in case you need to call them.

Things to look out for...

Some telephone responses are a warning of trouble. You may want to become alerted if:

- Someone asks for your home address before you are sure you want to meet them face-to-face. Use caution; remain in control of the situation.
- You specifically state in your ad that you want a female and a male calls supposedly for a female friend or wife. Do not answer any personal questions. Ask him to have his friend or wife call you herself.
- Someone calls to lay their desperate situation on you; they have to get a job and/or place to live right away. Stick to your written plan of pre-screening applicants.

You may want to consider having a friend or relative with you for support if you feel you may be nervous or anxious during this time. Remember to take notes about your impressions of each applicant following your phone call.

Scheduling the Face-to-Face Interview

If, at the end of your telephone screening, you think you would like to interview this person face-to-face, you can make those arrangements while you still have the person on the phone. You'll want to schedule the follow-up interview promptly so you don't lose people by making them wait.



Once you have decided to interview someone face-to-face:

- pick a day and set a time for the interview and
- give the person directions to your house.

Remind the person to:

- bring contact information for their personal and employment references and
- bring their resume or application to the interview.

If you prefer not to interview at your house, negotiate a reasonable meeting place. Be sure you have each other's phone number in case one of you needs to change the interview.

Tip: If you are scheduling several interviews, how long do you think each interview will take? If you allow an hour for the interview and 15 minutes after the person leaves to write down your impressions, you can schedule people every hour and fifteen minutes. After a few interviews, you will know if you need more or less time.

What if you don't want to interview someone?

You do not have to interview anyone. Let each person know you are taking names and phone numbers and will call them back if you decide to interview them. You may find that you would like to interview someone later, even though your initial reaction was not to. Taking everyone's name and address will ensure you can get back in touch with people if you change your mind.

If you are not sure, you can politely end the conversation by saying “Thank you for your time. I will be making my final selections by (date) and will notify my top choices on that day to set up another interview. Thank you again, good-bye.”

Self-directing your PA services is a rewarding job, but still a lot of work. Taking the steps to find a PA who is a good match for the job is worth the time it takes.

To help you keep track of your conversations with applicants during your telephone screening calls we have included the Telephone Screening Worksheet on the next page. You can add the information that is important to you.

Telephone Screening Worksheet		
After your telephone interview, take a moment and fill out the following summary.		
Name of Applicant:		
Date:		
Phone Number:		
Summary of Interview		
Most Important Issues for me	Yes	No
Applicant has a reliable car		
Applicant has a current driver's license		
Applicant can lift ____ pounds		
Information I Provided	Yes	No
I gave a general overview of the job.		
I provided financial and benefit information.		
We discussed the hours needed.		
Information Requested	Yes	No
I asked the applicant to bring:		
• Employment references		
• Personal references		
• A copy of the completed application from payroll agent		
• Copy of driver's license		
• Other:		
Personal interview scheduled for (day, place, time):		
Overall Impressions: What did I think about the applicant?		

Section 5 Checklist

Section 5 – Screening the Applicants Checklist	
Check here	
	I understand the value of pre-screening applicants.
	I read the guidelines for telephone screening.
	I decided whether I would use the sample script.
	I read about the things to look out for.
	I read how to schedule a face-to-face interview.
	I understand that I don't have to schedule a face-to-face interview with someone I don't want to interview.
	I looked over the Telephone Screening Worksheet.
	I have enough information to pre-screen my applicants with a telephone interview.

