

Shortlisting Grids

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Shortlisting Grids - Instructions & User Guide

Overview:

This guide provides step-by-step instructions on how to set up and add shortlisting grids to job adverts on MyNewTerm. This feature has been developed as the first phase of online shortlisting and enables candidates and hiring managers to easily view the shortlisting criteria for job vacancies.

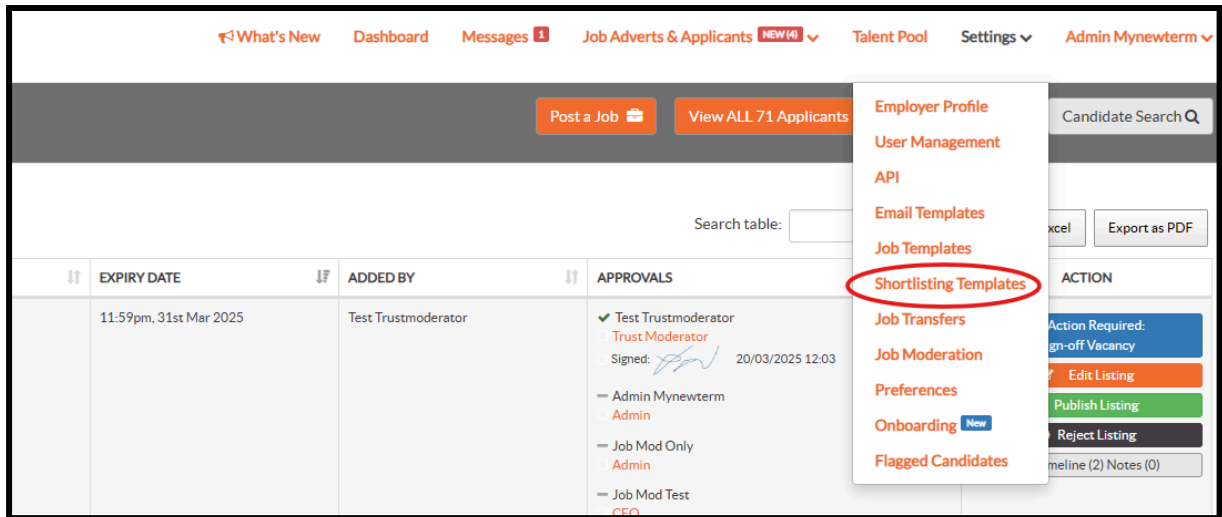
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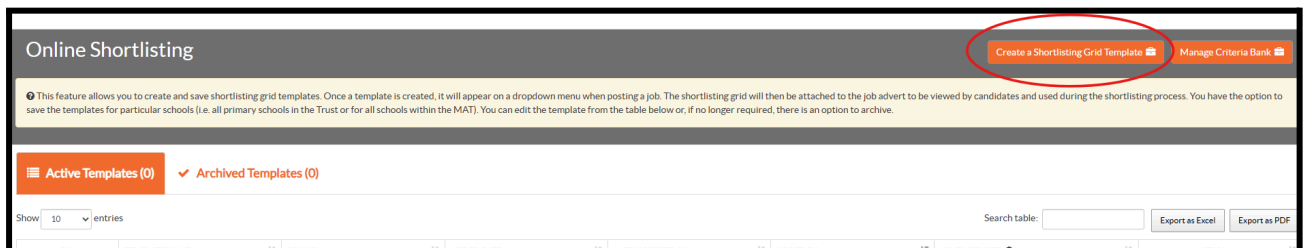


a) How do I set up shortlisting grid templates?

Step 1: Navigate to Shortlisting Templates (under the 'Settings' menu)



Step 2: Select 'Create a Shortlisting Grid Template'





Step 3: Fill out the template form

Give the template a name e.g. Teaching Assistant Shortlisting Grid and, if you are part of a MAT, select the schools the template will be used for. You can then add criteria for qualifications, skills and experience, selecting whether the criteria is essential or desirable. If any criteria has been previously added, this will display in the Criteria Bank.

Create a Shortlisting Grid Template

Template Name*

Teaching Assistant Shortlisting Grid

Trust School Applicable*

✕ All MAT schools

Qualifications

Qualifications Criteria Bank

Select From Saved Qualifications Criteria

Add New Qualifications Criteria*

Enter Qualifications Criteria

Essential/Desirable*

Essential

Add New Criteria

Example Qualification

Essential

Skills

Skills Criteria Bank

Select From Saved Skills Criteria

Add New Skills Criteria*

Enter Skills Criteria

Essential/Desirable*

Select...

Add New Criteria

Experience

Experience Criteria Bank

Select From Saved Experience Criteria

Add New Experience Criteria*

Enter Experience Criteria

Essential/Desirable*

Select...

Add New Criteria

Save ✓



Step 4: Save the template

Skills

Skills Criteria Bank

Select From Saved Skills Criteria

Add New Skills Criteria*

Enter Skills Criteria

Essential/Desirable*

Select...

Add New Criteria

Experience

Experience Criteria Bank

Select From Saved Experience Criteria

Add New Experience Criteria*

Enter Experience Criteria

Essential/Desirable*

Select...

Add New Criteria

Save ✓

Once saved, the template will be stored in your Active Templates:

Active Templates (1) ✓ Archived Templates (0)

Shortlisting template has been created successfully.

Show 10 entries

Search table:

Export as Excel

Export as PDF

S/N	TEMPLATE NAME	SCHOOL	ADDED DATE	LAST MODIFIED ON	ADDED BY	IF	NO. TIMES USED	ACTION
1	Teaching Assistant Shortlisting Grid	All MAT schools	27th Mar, 2025		Admin Mynewterm (Admin)		0	Edit Archive Timeline

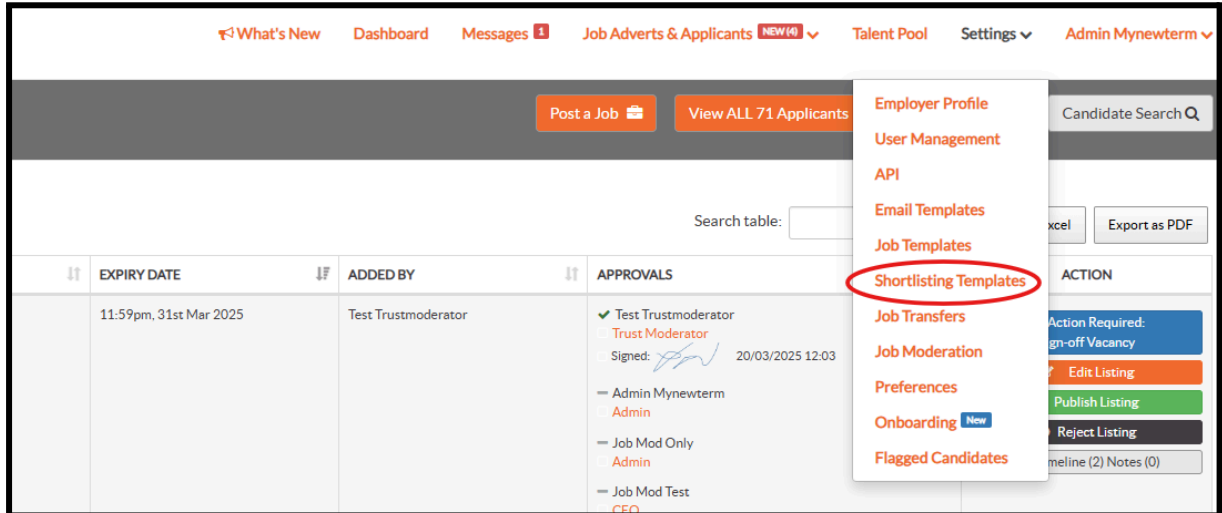
Showing 1 to 1 of 1 entries

Previous 1 Next

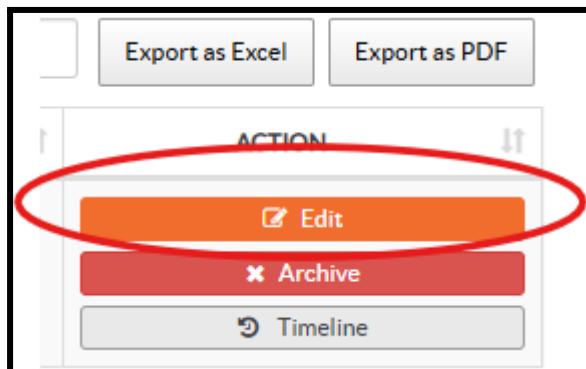


b) How do I edit a shortlisting grid template?

Step 1: Navigate to Shortlisting Templates under the Settings menu




Step 2: Select Edit next to the required template





Step 3: Add new criteria or delete existing criteria then save the template

 Edit Shortlisting Template

Template Name*

Teaching Assistant Shortlisting Grid

Trust School Applicable*

× All MAT schools

Qualifications

Qualifications Criteria Bank

Add New Qualifications Criteria*

Enter Qualifications Criteria

Essential/Desirable*

Select...

Add New Criteria

Example Qualification 3

Desirable

Example Qualification 2

Essential

Example Qualification 1

Essential

Skills

Skills Criteria Bank

Add New Skills Criteria*

Enter Skills Criteria

Essential/Desirable*

Select...

Add New Criteria

Example Skill 3

Desirable

Example Skill 2

Essential

Example Skill 1

Essential

Experience



c) How do I add a shortlisting grid to a job advert?

Step 1: Click to post a job as normal and fill in the form

Post a Job

Trust School*
Select...

Job Templates ⓘ
Select...

Important: Teaching Assistant, Higher Level Teaching Assistant (HLTA), Learning Support Assistants and Cover Supervisors are all to be listed under Professional & Support (not teaching).

Job Category*
Select...

Establishment Type*
Select...

Job Type*
Select...

Stage/Subject*
Select...

Step 2: Tick the box towards the bottom of the form to add a shortlisting grid

****Top tip**** - If you use the section below, candidates do not need to provide a personal statement with the minimum character count. It can also help the shortlisting panel as all candidates answer the same questions you provide. It proves effective for all roles but, in particular, for support roles (e.g. Cleaners, Midday Supervisors, Exam Invigilators, etc) as it provides support for the candidate. We highly recommend giving it a try!

The feature provides the option to enter specific questions for the candidate to complete in the personal statement section of their application. To include, simply tick the box and enter the questions to include (up to a maximum of 10). The questions will auto-save into your 'Question bank' for future reference. If you do not include specific questions, the candidate will be presented with the main Personal Statement box and asked to refer to the person specification to detail how they meet the requirements of the role.

☐ Add specific personal statement questions for candidates?

This feature allows you to include a shortlisting grid on the job advert. This can be used by candidates when writing their personal statement and hiring managers when shortlisting candidates. To include, simply tick the box and either enter the criteria or select a previously created template from the dropdown.

☐ Add a shortlisting grid for hiring managers and candidates?

☐ Do you want to restrict any users from viewing this job vacancy? ⓘ

☐ Is this post for internal applicants only? ⓘ

☐ Does this post require a valid driving licence?



Step 3a: Select the required template from the dropdown

This feature allows you to include a shortlisting grid on the job advert. This can be used by candidates when write, include, simply tick the box and either enter the criteria or select a previously created template from the dropdown

☒ Add a shortlisting grid for hiring managers and candidates?

Shortlisting Template*

Select...

Teaching Assistant Shortlisting Grid

Create a Shortlisting Grid

Step 3b: Select to Create a Shortlisting Grid and fill out the required criteria

This feature allows you to include a shortlisting grid on the job advert. This can be used by candidates when write, include, simply tick the box and either enter the criteria or select a previously created template from the dropdown

☒ Add a shortlisting grid for hiring managers and candidates?

Shortlisting Template*

Select...

- OR -

Create a Shortlisting Grid



Create a Shortlisting Grid Template

Template Name*

Qualifications
Qualifications Criteria Bank

Add New Qualifications Criteria

Essential/Desirable

Add New Criteria

Skills
Skills Criteria Bank

Add New Skills Criteria

Essential/Desirable

Add New Criteria

Experience
Experience Criteria Bank

Add New Experience Criteria

Essential/Desirable

Add New Criteria

Save ✓

Note: any previously added criteria will appear in the criteria bank.

Step 4: Preview the shortlisting grid

To check that you are happy with the shortlisting grid, there is the option to preview it:

This feature allows you to include a shortlisting grid on the job advert. This can be used by candidates when writing their personal statement and hiring managers when shortlisting candidates. To include, simply tick the box and either enter the criteria or select a previously created template from the dropdown.

☒ Add a shortlisting grid for hiring managers and candidates?

Shortlisting Template*

Preview

- OR -

Create a Shortlisting Grid



Shortlisting Criteria

Qualifications	
Example Qualification 3	Desirable
Example Qualification 2	Essential
Example Qualification 1	Essential
Skills	
Example Skill 3	Desirable
Example Skill 2	Essential
Example Skill 1	Essential
Experiences	
Example Experience 3	Desirable
Example Experience 2	Essential
Example Experience 1	Essential

Close

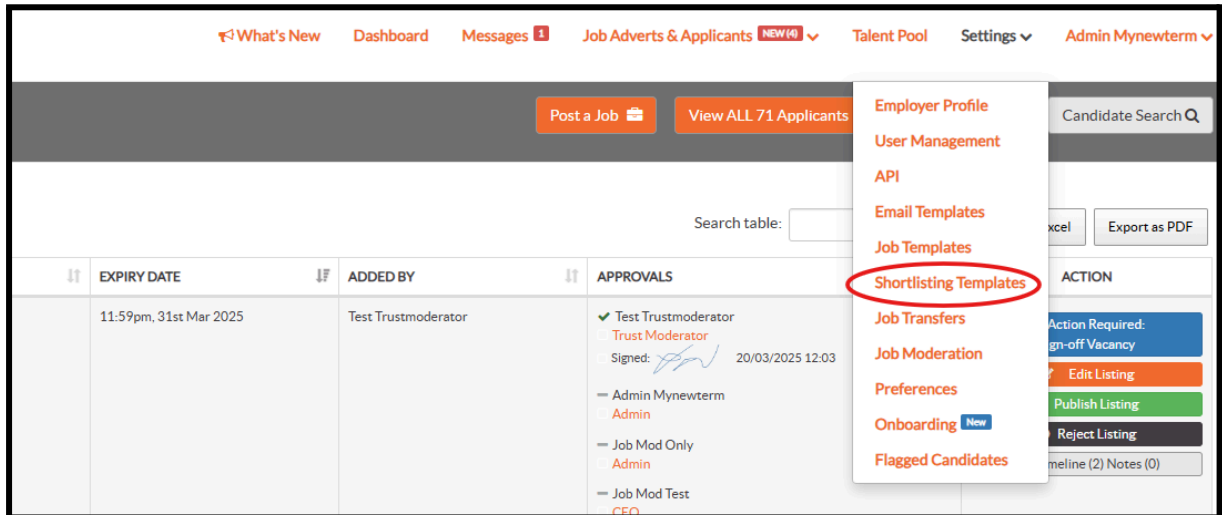
Step 5: Post the job as normal

The shortlisting grid will then appear at the bottom of your job advert for candidates or hiring managers to view.

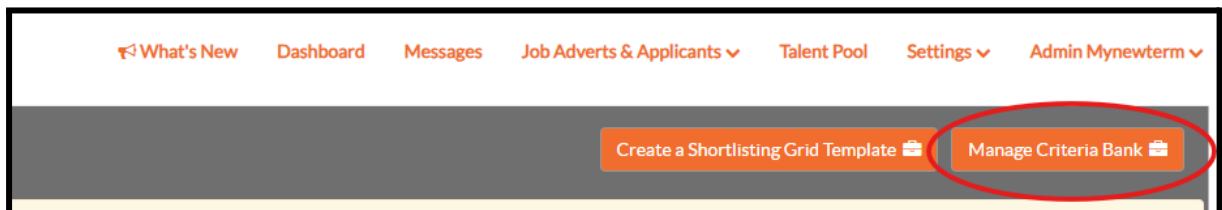


d) How do I manage the criteria bank?

Step 1: Navigate to Shortlisting Templates under the Settings menu



Step 2: Click 'Manage Criteria Bank' on the right hand side



Step 3: Select the criteria list to manage and edit or delete specific criteria

Select Criteria Bank

Qualifications

Select

Qualifications

Skills

Experience

View All

Example Qualification 2

Essential

Example Qualification 1

Essential

Example Qualification

Essential

Qualification 3

Desirable

Qualification 2

Essential

Qualification 1

Essential

Search

1

Note: you are able to edit the name of the criteria and whether it is essential or desirable.



e) FAQs

a) **What is a Shortlisting Grid?**

A shortlisting grid features all the criteria you are looking for from a prospective candidate and can be used during the selection process. As it is part of the job advert, it can be seen by both candidates and hiring managers.

b) **I do not have 'Shortlisting Templates' under my settings menu**

If there are other users that are part of your school or MAT, they will be able to add this to your user permissions. If not, either get in touch with your account manager or pop onto the live chat on the MyNewTerm website.

c) **Can I archive shortlisting templates no longer in use?**

If you navigate to the shortlisting templates section, you will see the option to archive next to each template. This can be reversed if needed.

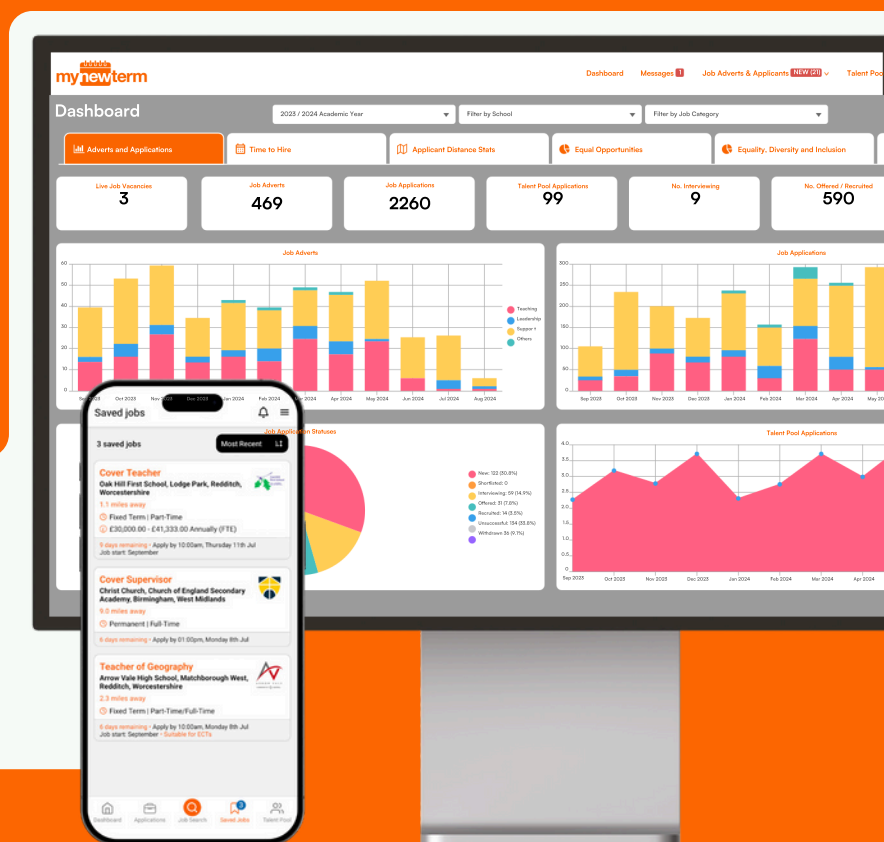
d) **Can I check how many times a template has been used?**

Yes, you can view how many times a template has been used under the 'No. Times Used' column in the templates table of the Settings > Job Templates page. Additionally, you can check the history of a template, which details when it was created, used or archived by clicking on the 'Timeline' button at the right of each template.

If you have any further questions, please get in touch via **Live Chat**
or by emailing hello@mynewterm.com



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