The following steps will help guide you through the interview process. Corresponding resources needed are **bolded** below, and available for download within the OSC program: Recruit, Select, and Onboard Your Staff. Following this procedure will help ensure an organized, thorough, and consistent vetting of applicants.

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\*Modify materials based on your local labor laws and be aware of changes to these laws over time. Consult your labor attorney for specific questions and guidance.

#1 Contacting Applicants by Telephone

**Purpose:** To further filter and strengthen your applicant pool.

**Prepare:** You have sorted through applications and identified promising applicants based on knowledge, skills, and abilities. Next, review the Say This, Not That Interview Questions to Avoid document to help you avoid legal implications and ask suitable questions. Then, call each applicant, following the Telephone Filter Questionnaire, to get a general idea of compatibility and rapport, before deciding to advance the applicant to a formal interview. Keep on record for three years.

**Behavior:** As the call progresses, take note of your impression of the applicant. Do they remember applying for your position? Can you visualize this person answering your phones; professional, articulate, helpful, good manners?

If there are any major red flags, you will *not* want to invite them to an interview. If you have doubts, get through all of your calls, and you can always come back to them if your applicant pool becomes limited.

**Call Script:**“Good Afternoon! Is Sara available? Hi, this is Anita Jones, calling from ABC Eye Care. We received your application for the \_\_\_\_\_\_\_\_\_ position and have a few questions for you. Is now a good time?” (Remember the applicant may be at work.)

#2 Scheduling an Interview by Telephone

**Purpose:** To continue the interview process. The applicant satisfied your filter questions during the telephone interview. Next, invite them to a formal interview.

**Behavior:** Do they appear to be taking down notes regarding your instructions? Do they repeat the details back to you for confirmation? Do they “customer service” you by smiling through the phone, communicating with positive energy, and thank you for calling? Do they hang up the phone first?

**Call Script:**“Hello, is Sara available? Hello, Sara. This is \_\_ calling from \_\_\_ regarding our \_\_\_ position. I’m calling to advance you to a formal interview. Would you be available this \_\_\_\_ at \_\_\_\_ p.m.?” “Wonderful, our address is \_\_\_. You may enter through the front door and let our receptionist know you have arrived for an interview. We will ask you to fill out our standard “Application for Employment” prior to the interview, if you would like to bring your resume to reference. Do you have any questions for us at this time? If needed, you may contact me at phone or email.” We look forward to speaking with you, Sara.”

**Schedule the First Formal Interview:**

1. Provide two or three dates/times you are available to conduct the interview. You can be flexible, but they will make time in their schedule if it is important to them. If they are not willing to be flexible, this can be a red flag as to what type of mentality they have towards an employer-employee relationship.
2. Provide instructions as to where they should park and which door they should enter through.
3. Briefly explain your interview process, duration, and the possibility for a second final interview.
4. Notify your candidate that a **Standard Application** is also required, if all you have is their resume, and let them know it must be completed prior to their interview. Offer to email, fax, or mail and request they return it at the time of their interview. Note: Employers must verify that the candidate’s signature (acknowledging permission for the reference check) is on the employment application *before* starting the interview. Keep on file for three years.
5. Notify your candidate that they will be asked to provide three professional references and sign an authorization to contact given references.
6. Provide your phone number and email address, in the event they need to get in contact with you.

#3 First Formal Interview

**Purpose:** To assess each candidate equally, and further narrow the applicant pool.

**Behavior:** In the first formal interview, the candidate should be doing most of the talking. This allows them to ask questions and demonstrate the value they can contribute to the team.

**Preparation & Paperwork:** For Your Office:

* Candidate Interview Log
* Candidate’s Application for Employment, and resume if submitted. Provide copies of these documents if others will be participating in the interview, and highlight sections that stand out, good or bad, to ask follow-up questions during the interview.
* If the candidate has not filled out your Application for Employment, they will need to do so prior to the start of the interview. Ensure their signature was provided to authorize reference checks. Cross out any fields on the “Application for Employment” that are not allowed in your state.
* Sample Math Test KEY to quickly grade your candidate’s Sample Math Test prior to starting the First Interview Questionnaire.
* List of interview questions, see First Interview Questionnaire and customize based on input from key interviewers, requirements of the position, and applicable legal considerations. Provide copies if others will be participating and assign questions to avoid confusion, interruptions, and demonstrate professionalism.
* Confirm and communicate with your admin team and staff, where your interview will take place to ensure it is available, clean, and has enough seating.
* Reminder to others participating in the interview – day before and morning of
* Reminder to staff regarding arrival times of the candidates
* Job Description to provide to the candidate, see OSC resources for Patient Communication Facilitator Sample.
* If advancing to a second formal interview, have your business card prepared to present to the candidate at the end of the first interview.
* Prepare a farewell script such as, “Thank you again Sara, we will contact you within two weeks and go from there!”

For Your Candidate:

* Application for Employment if not already submitted. This will ensure you are gathering consistent information from each applicant, are providing legal notices, and obtaining employment eligibility status. Check your state requirements.
* Sample Math Test
* If you decide to advance the candidate to a second interview, provide:
* Abbreviated Benefits List: Employee Benefits Summary Sheet
* Copy of your Mission Statement & Company History

**Arrival of the Candidate:**

1. Special Welcome: Be available to greet them and briefly explain the interview process.
2. Ask the candidate to fill out your “Application for Employment” if not already completed. A new application is required each time a candidate applies at your office.
3. Ask the candidate to fill out your Authorization for Release of Employment Information for permission to contact the references provided on the “Application for Employment”.
4. Provide the Sample Math Testand instructions; no assistance, including the use of a calculator or other device, provide the test on a clip board with a pen or pencil, who they should notify when completed, then grade/score before moving on with interview questions. Most candidates will finish the test within five to seven minutes.
5. Interview:Invitation to interview location if conducting in person. Introductions from all participants including the candidate. Begin First InterviewQuestionnaire.
6. Tour: Briefly show off your office and make introductions where available. This is a good marketing tactic, even if you choose someone else, they may be inclined to apply in the future, or visit your office as a patient if they like what they see behind the scenes.  Ensure your staff also gives these candidates a special welcome and understands how you want them to engage during the tour.
7. Special Goodbye: “Thank you for your time today, it was a pleasure to get to know you. We will be contacting your professional references and go from there.” Provide them with your business card and let them know approximately how long the decision-making process may take. Avoid making promises for future interviews, offers, or a written reply.
8. Evaluate: Schedule five minutes to meet immediately after the interview to compare and record notes on the Candidate Interview Log.Observations; was the candidate prepared with a copy of their own resume? Did they bring a pen? Did they engage with your team and ask questions? If there are any major red flags, you will not want to invite them to a second interview. If you are unsure, get through all of your interviews, and you can come back to this candidate if your applicant pool becomes limited. Do not discard of any forms/information obtained. All documentation must be saved and filed in a “search file” for a minimum of three years.
9. Reference Checks: Next, if the candidate was invited to a second interview, determine who will proceed with the reference check process, outlined on the next page.

#4 Reference Checks

**Purpose:** To provide valuable information about the candidate's qualifications and work experience.

Review each resource prior to beginning the Employment Reference Check process:

* "Conducting an Employment Reference Check"
* "Authorization for Release of Employment Information"
  + Obtain a signed authorization for each professional reference listed.
* "Request for Release of Employment Information"
* "Reference Check Form"

**Recordkeeping:** The person completing the reference checks must retain a record of the reference process. The file should include names and titles of those who provided the references and a list of the questions asked and the information provided. The "search file" should be retained for three years.

#5 Second Formal Interview

**Purpose:** To ask additional questions and perform additional skills tests. To reaffirm attributes observed during the first interview. To reassure you that a candidate is a good match for the position and your company vision. To check for consistency in information, punctuality, energy, and interest from a narrowed pool. To expose professional interviewers, and give nervous candidates a second chance to shine. To ask for proof of certifications, if applicable to the requirements of the position.

**Preparation & Paperwork:**

Data Entry test, or other skills test, related to the position they are applying for; 4-point frame alignment, transposing a prescription, etc. Perform a Profiles Global, DISC Assessment at this point for added insight, contact your consultant for details on this resource. See attachment Background to DISC for how to interpret and analyze results of the candidate’s DISC assessment results.

**Arrival of the Candidate and Behaviors:**

1. Special Welcome: Be available to greet them and briefly explain the interview process.
2. Skills Tests: Profiles Global, DISC Assessment, data entry test, or other job-related tasks.
3. Interview: Invitation to interview location if conducting in person. Begin Second Interview Questionnaire.
4. Special Goodbye:
5. Evaluate: Schedule five minutes immediately after the interview to compile notes on your Candidate Interview Log. Note ability to foster a relationship within 30 seconds; make eye contact, smile, and engage. Note arrival time, attire, and if they followed other instructions such as where to park and enter the building. Were they kind to your staff and courteous of patients?
   1. Review Profiles Global, DISC Assessment results for further insight as to how the employee sees themselves in a working environment. List potential pros and cons, should you offer this individual the position.
6. Select: After agreeing on the best candidate to hire, contact the candidate to offer the position, starting hourly wage, and start date (date of hire). Once verbally agreed on, write out your offer letter and send to your new employee. Congratulations!

Note: Wait to send regret letters to the other applicants until after your desired candidate accepts the position. This provides you with a safety net in the event you and the desired candidate are not able to come to an agreement on wages, start date, they decide to take another job, or stay at their current job.

#6 Offer Letter

**Purpose:** To professionally extend all details of offer in writing including; job title, hourly wage, and start date.

**Resources:**

“Offer Letter Template on Letterhead”

“Offer Letter Extensive Template on Letterhead”

#7 Regret Letters

**Purpose:** To professionally and respectfully thank and inform applicants that they are no longer being considered for the position for which they applied.

Any immediately rejected applicants, due to high lack of skill or professionalism, should receive a regret letter within 10 business days, as a courtesy and to thank them for applying.

Any interviewed candidates should receive a phone call and regret letter after the selected candidate confirms acceptance of the position and confirms a start date.