

# Manual Assessment User Guide

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# Introduction

Within the USA Staffing system, a **Manual Assessment** is a placeholder that allows HR users to document applicant scores for an assessment that occurs after initial application and prior to certification. The Manual Assessment functionality allows users to import or manually key enter scores for assessments that are delivered outside of the USA Hire system. Manual Assessments can take a variety of forms such as Subject Matter Expert (SME) panel ratings, structured interviews, accomplishment records, agency tests, or composite scores for multiple assessments.

This guide will explain the Manual Assessment functionality in USA Staffing, including setting up a Manual Assessment, understanding the scoring options, exporting applicants, importing scores, and using Manual Assessments with Panel Reviews. Throughout the guide, we will also provide scenarios to help illustrate how a Manual Assessment might be used in practice. Please note that these scenarios are simply examples; the Manual Assessment functionality is flexible, and agencies can use it in numerous different ways depending on the job analysis, consultation with the selecting official, and agency guidance. If you are considering a new assessment process using this functionality, we recommend trying it out in the [USA Staffing Training](#) environment first, so you can gain some hands-on experience with each piece of the process before using it in a live vacancy.

## Creating a Manual Assessment

Manual Assessments can be added to either a vacancy's Assessment Package or to an Assessment Package Template. If you plan to include a Manual Assessment in your vacancy's Assessment Package, you must do so *before the announcement is released and opened to USAJOBS*. You should also inform applicants in the Announcement Text ("How You Will Be Evaluated" section) of any additional assessment steps that will occur after they submit their application.

Manual Assessments may be combined with an Assessment Questionnaire, USA Hire assessment, and/or SME Evaluation assessment, and they can be part of a multiple hurdles assessment approach. In addition, multiple Manual Assessments can be included in an Assessment Package, if needed. The settings and weights of each assessment can be established on the Assessment Plan page in accordance with your agency's processes. For more information on using a multiple hurdle process, please see the **Multiple Hurdles Guide** on the [USA Staffing Resource Center](#).

To create a Manual Assessment for a vacancy:

1. Click the **Assessment Package** tab.
2. On the Assessment Plan page, click **New Assessment**. The **Create Assessment** tab will display.
3. Enter the **Assessment Name**.
4. Select **Manual** from the Assessment Type drop-down list. **Note:** The option to do this is permissioned. Please see the [Manual Assessments Permissions](#) section for details around permissions.

VACANCY 10190732

Vacancy 10190732 Assessment Package Announcement Reviews ✓ Assessment: HR specialist SI

USA/JOB Announcement Title: HR Specialist Pay Plan-Series-Grade: GS-0201-12/13 Assessment ID: 437100

Assessment Information Competencies Passing Score Criteria Checklist History

Assessment Information \* = Required

Assessment Name \* HR specialist SI

Assessment Type \* Manual

Assessment Method \* Interview

Assessment Method Details \*
 

- \* Structured Interview
- \* Technical Interview

☒ Screen-out
 ☒ Rating
 ☐ Passing Score

Owner \* Kasey Acres

Hurdle \* Hurdle 2: Manual Assessment

Assessment Rating Settings

☒ Standardize scores
 ☐ Standardize using custom values

Series	Grade	Min Raw Score *	Max Raw Score *	Min Z-Score	Max Z-Score
0201 - Human Resources Management	12	0	25	-3	3
0201 - Human Resources Management	13	0	30	-3	3

Save Delete Cancel

5. Select the **Assessment Method** from the following options:
  - **Online/Paper-Pencil Assessment:** A written assessment typically consisting of multiple-choice questions administered to applicants outside USA Staffing and USA Hire either through an online platform or in a paper and pencil format.
  - **Panel Review:** A review of applicants' documents (e.g., resume, transcripts, work product sample) conducted by one or more Subject Matter Experts (SMEs) working either independently or as a panel to evaluate applicants' qualifications.
  - **Interview:** An in-person or virtual evaluation of applicant qualifications by asking them questions and evaluating their oral responses.
  - **Simulation:** An exercise used to assess how applicants would react to situations similar to those encountered on the job and how they would solve job-related problems. Simulations are typically scored by trained SMEs.
  - **Other:** A category for any other assessment method that is not included in one of the categories above.
6. Select the **Assessment Method Details**. The options in this field will depend on the choice made for the Assessment Method, and more than one option may be selected. If the "Other" option is selected for the Assessment Method, then the Assessment Method Details field will require a free-form text entry, rather than picking options from a predefined list.
  - a. **Online/Paper-Pencil Assessment:**
    - i. *Biodata:* Biographical data (biodata) measures include items about past events and behaviors reflecting personality attributes, attitudes, experiences, interests, skills, and abilities validated as predictors of overall performance for a given occupation.
    - ii. *Job Knowledge:* Job knowledge tests, sometimes referred to as achievement or mastery tests, typically consist of questions designed to assess technical or professional expertise in specific knowledge areas.
    - iii. *Personality/Non-Cognitive:* Tests that measure applicants' non-cognitive traits, such as personality, preferences, work styles, and integrity/honesty.
    - iv. *Cognitive Ability/Reasoning:* Tests that assess abilities involved in thinking (e.g., reasoning, perception, memory, verbal and mathematical ability, and problem solving). Such tests pose questions designed to estimate applicants'

potential to use mental processes to solve work-related problems or to acquire new job knowledge.

- v. *Situational Judgment*: Situational judgment tests (SJTs) present applicants with a description of a job-related problem, situation, or scenario and ask applicants to evaluate potential responses.

b. **Panel Review:**

- i. *Accomplishment Record*: An evaluation of applicants' narrative descriptions of personal accomplishments that illustrate their proficiency on critical job competencies, typically rated by a panel of trained SMEs using consistent criteria.
- ii. *Crediting Plan*: A crediting plan/rating schedule is a systematic method used to evaluate the factual background of an applicant (e.g., positions held, levels of responsibility, accomplishments, job-related education) against established job-related criteria.
- iii. *Reference Check*: An objective evaluation of applicant's past job performance based on information collected from key individuals (e.g., supervisors, peers, subordinates) who have known and worked with applicants.
- iv. *Structured Resume Review*: A trained panel of two or more SMEs that follows a systematic process to review an applicant's resume and come to agreement in determining whether or not the applicant has the required specialized experience necessary to successfully perform the job.
- v. *Work Product Sample*: An evaluation of applicants' qualifications based on supporting documents that demonstrate their expertise (e.g., portfolio, report, programming code).
- vi. *Writing Sample*: An evaluation of applicants' writing competency based on a sample of their past writing.

c. **Interview:**

- i. *Job Compatibility Interview*: An interview to collect information on applicants' personality, interests, values, or preferences relevant to the characteristics of the job or organization.
- ii. *Structured Interview*: An interview in which a panel of trained raters evaluates candidates' responses to a pre-defined set of questions against a standard set of evaluation criteria. It employs rules for eliciting, observing, and evaluating responses and limits the amount of discretion an interviewer is allowed.
- iii. *Technical Interview*: An interview that assesses applicants' technical or specialized knowledge in critical areas needed for the job.

d. **Simulation:**


- i. *Assessment Center*: Use of multiple assessment methods and exercises to evaluate a wide range of competencies, typically designed to simulate actual situations or challenges found on the job.
- ii. *Job Simulation Exercise*: An assessment that requires applicants to perform tasks or work activities that reflect the tasks employees perform on the job.

7. Indicate whether the assessment will be used for one or more of the following:

- a. **Screen-out**: Indicates that the assessment will be pass/fail, which means applicants could be rated either eligible or ineligible based on their results.
- b. **Rating**: Indicates that the assessment will be scored, which means applicants will receive numerical ratings based on their results.
- c. **Passing Score**: Indicates that applicants will need to receive a minimum score to demonstrate that they possess the minimum required proficiency level for the

position. Notes: The option to use a passing score is dependent on the *Rating* setting being turned on and is also permissioned. Please see the [Manual Assessments Permissions](#) section for details around permissions. Passing scores should be established through a rigorous process involving job experts (subject matter experts) and assessment experts (e.g., I/O psychologists). For more information on passing scores, please see the [Assessment Passing Scores FAQs](#).

8. The **Standardize scores** option is *disabled* by default, but you can enable it if you are using your assessment for *Rating* and you have the right permission to do so. Please see the [Choosing a Scoring Option for a Manual Assessment](#) section below on use cases for standardizing scores and the [Manual Assessments Permissions](#) section for details around permissions.
9. If using the assessment for rating, you will need to enter the minimum and maximum raw score for each rating combination. If the position has more than one rating combination, different values may be entered for each one.
  - a. **Min Raw Score:** Indicates the minimum number of points that an applicant could receive.
  - b. **Max Raw Score:** Indicates the maximum number of points that an applicant could receive.
10. Click **Save**. Once you save the assessment, the title of the tab will be updated to reflect the Assessment Name and the **Competencies**, **Passing Score Criteria** and **Checklist** pages will be enabled. Once the assessment is saved, the Assessment Type field will be locked, but other fields will still be able to be updated.
11. On the **Competencies** page, you can document any competencies that will be evaluated using the Manual Assessment. Competencies can be added from the competency network library or created manually if you have the right permission to do so.

 **Helpful Tips:** Any competencies you add to your Manual Assessment will be automatically displayed for applicants on the USAJOBS announcement, if you include a data insert for Competencies List or Competencies Bullets. If you're assessing the same competency with two different assessments, be sure to use the same Competency ID, so that the competencies will not be duplicated in the data insert list.
12. On the **Passing Score Criteria** page, you can see the raw score range for each rating combination. If the Passing Score setting is enabled and you have the Apply Passing Scores permission, you can set the Passing Score that applicants will need to meet in order to demonstrate that they possess the minimum required proficiency level for the position. Note: For more information on passing scores, please see the **Assessment Passing Scores FAQs** on the [USA Staffing Resource Center](#).
13. On the **Checklist** page, the system will flag any potential issues that need to be addressed.
14. At this point, you have created your Manual Assessment, and if there are no other assessments to be added, you can proceed to the Assessment Package - Checklist and click **Complete Assessment Package**.

**Scenario 1:** The agency is recruiting for a position at two grades and will conduct a structured interview to determine the best qualified candidates for certification. The structured interview has 5 questions at the lower grade and 6 questions at the higher grade. Each question relates to a critical competency and uses a 1 to 5 rating scale. It is not possible to “fail” the interview, but if an applicant chooses not to participate or doesn’t appear for their interview appointment, they will be screened out from further consideration.

#### **Manual Assessment Set Up:**

- **Assessment Method:** Interview
- **Assessment Method Details:** Structured Interview
- **Screen-out:** Enabled, since applicants will be ineligible if they fail to complete the interview
- **Rating:** Enabled, since the interview will be scored
- **Passing Score:** Disabled, since the interview won’t be pass/fail
- **Min Raw Score:** reflects the minimum of 1 point per question x 5 questions
  - Lower grade: 5
  - Higher grade: 6
- **Max Raw Score:** reflects the maximum of 5 points per question x number of questions\
  - Lower grade: 25
  - Higher grade: 30
- **Competencies:** Add the competencies that will be evaluated during the interview

## Choosing a Scoring Option for a Manual Assessment

We strongly encourage you to consult an Industrial/Organizational (I/O) Psychologist or your USA Staffing Account Manager as you are considering the scoring approach to use for your Manual Assessment. Scoring decisions can have considerable impact on how your applicants are rated, and there are several factors to consider that could impact these decisions, such as the type of assessment, the scoring scale, the sample size, or the number of assessments. While the information in this guide is provided to explain the options available in the system, decisions about the most appropriate method for handling scores should be made in consultation with an assessment professional, e.g., I/O Psychologist. The primary scoring decision for Manual Assessments is whether or not to standardize scores.

Standardizing scores is generally advised when combining two or more independent assessments. When using multiple assessments with different rating scales, standardizing scores for each assessment allows assessment scores to be appropriately combined to determine an applicant’s final score.

## How does the system calculate applicant Manual Assessment scores when they are not standardized, and when might this option be used?

The default scoring method for Manual Assessments is not to standardize scores. Keeping the Standardize scores setting disabled for a Manual Assessment will simply convert an applicant's raw score to a transmuted score, which is on the 70 to 100 scale. This is the same process that occurs when an Assessment Questionnaire is used independently (without a Manual or USA Hire assessment) to rate applicants during the initial application process. The system will apply the following transmutation formula:

Examples of vacancy scenarios where this default scoring option might be used for rating applicants include:

$$\text{Applicant Transmuted Score} = 70 + ((\text{Applicant Raw Score} - \text{Min Raw Score}) / (\text{Max Raw Score} - \text{Min Raw Score}) \times 30)$$

1. The Manual Assessment will be the only scored assessment within the Assessment Package, e.g., the initial Assessment Questionnaire will only be used for screen-out questions, or
2. The Manual Assessment will be the only assessment used in calculating the applicants' final scores, e.g., the initial Assessment Questionnaire will be rated, but zero-weighted, or
3. The Manual Assessment functionality will be used to input applicant scores that have already been standardized prior to loading them into USA Staffing, or
4. The applicant pool is small in size and/or the assessment shows limited differentiation among applicants, i.e., all applicants scored roughly the same on the assessment(s).

## How does the system calculate applicant Manual Assessment scores when they are standardized, and when might this option be used?

Enabling the Standardize scores option for a Manual Assessment will mean that the system will factor into an applicant's transmuted score how they performed *relative to other applicants* who applied to the same vacancy and completed the same assessment. The option to enable the Standardize scores setting for a Manual Assessment is available only if you have the appropriate [permission](#) to do so.

It is important to note that if you are using a Manual Assessment in combination with a rated Assessment Questionnaire and you enable the Standardize scores setting for the Manual Assessment, the system will *automatically also standardize the applicants' Assessment Questionnaire scores* prior to combining the scores from the two assessment types to arrive at each applicant's final score. Regardless of whether the Assessment Questionnaire and Manual Assessment are located in the same or separate hurdles, a rated Assessment Questionnaire is automatically standardized if the Manual Assessment is standardized.

To calculate an applicant's assessment-level transmuted score when this option is enabled, the system will first calculate the average applicant raw score (mean) and the assessment's raw score standard deviation, then convert the raw score to a z-score, and finally transmute the z-score to the transmuted score on the 70 to 100 scale. The following formulas will apply:



$$\text{Applicant Z-Score} = (\text{Applicant Raw Score} - \text{Mean Raw Score}) / \text{Raw Score Standard Deviation}$$

$$\text{Applicant Transmuted Score} = 70 + ((\text{Applicant Z-Score} - \text{Min Z-Score}) / (\text{Max Z-Score} - \text{Min Z-Score}) \times 30)$$

If the Assessment Package contains multiple rated assessments, then once each assessment's transmuted scores have been calculated, the system will combine them using the proportional weights assigned to each assessment in the Assessment Plan to arrive at an applicant's final score.

Standardizing scores is generally advised when combining two or more independent assessments. When using multiple assessments with different rating scales, standardizing scores for each assessment allows assessment scores to be appropriately combined to determine an applicant's final score.

Examples of vacancy scenarios where the **Standardize scores** option might be used for rating applicants include:

1. The Manual Assessment will be used in combination with an Assessment Questionnaire, and you expect at least a moderate-sized applicant pool, or
2. The Manual Assessment will be used in combination with a USA Hire Assessment, or
3. The Manual Assessment will be used in combination with another Manual Assessment (e.g., structured interview, writing assessment, or accomplishment record), or
4. The Manual Assessment functionality will be used to input applicant scores that have not been standardized prior to loading them into USA Staffing.

## How does the system calculate applicant Manual Assessment scores when they are standardized using custom values, and when might this option be used?

**Enabling the Standardize scores option** for a Manual Assessment will allow you to also enable the Standardize using custom values setting if you have the appropriate [permission](#) to do so. This additional setting will allow you to:

1. Set custom **Min Z-Score** and **Max Z-Score** values on the Assessment Information page of the Manual Assessment, and
2. Set custom **Mean Raw Score** and **Standard Deviation** values for each rating combination of the Manual Assessment on the Assessment Plan page of the Assessment Package.

When the **Standardize using custom values** setting is used for a Manual Assessment, the system will apply the same standardization formulas outlined in the previous section. The only difference is that rather than calculating the mean and standard deviation values based on the applicants' scores and using the default values for Min and Max Z-Scores (-3 and 3 respectively), it would instead apply the custom values that were entered by the HR user.

An example of a scenario where the **Standardize using custom values** option might be used is when the agency has administered the assessment extensively to multiple rounds of applicants, and the agency's assessment professionals have determined that applying standardization values compiled from those previous assessment administrations is more appropriate than standardizing the applicants' scores using the system-calculated values for each single vacancy announcement.


# Exporting Manual Assessment Applicants

As applicants apply, if they are eligible based on their responses to the Assessment and Announcement Questionnaires, and they meet the Hurdle Criteria when using multiple hurdles, they will be assigned a 'PA' or 'Pending Assessment' Record Status Code (RSC). This status indicates that an applicant is missing scores for one or more required assessments. Applicants will remain in a PA status until the Manual Assessment scores are entered and a final score can be calculated.

There are two ways to enter applicant scores for Manual Assessments:

1. Using the **Export/Import** process to generate a list of applicants, which can be opened using Microsoft Excel and can be used to import their Manual Assessment results, or
2. **Key entering** the Manual Assessment results one applicant at a time by opening the **Rating Details** for each application.

The Export/Import process is especially beneficial when there are a significant number of applicants who need to be assessed. To generate an exported list of these applicants:

1. From the **Applicant Overview** tab, click **Create List**.
2. Apply filter criteria as needed and **Save** the list.  
 **Helpful Tips:** Filter criteria can include using the RSC filter to focus on PA applicants or using an Assessment Filter to narrow down the list to those who achieved a cutpoint on the initial Assessment Questionnaire.
3. From the **Gear** icon in the top right section of the saved list, select **Export Manual Assessment File**.
4. You will be given the option to select the desired Manual Assessment and choose whether the export file should include **All Applicants** or **Filtered Applicants**. You will also be able to indicate if you would like to include data in the export file for the applicants' *USAJOBS Applicant GUID, Email Address, Phone Numbers and/or Augmented Scores*. Make the appropriate choices and click **Export**.
5. The following message will display: "Your export file is being generated. When it is complete, you will receive an alert. Click on this alert to download the file." Click **OK**.
6. When you receive the alert, click on the alert message to download the .csv file.

**Scenario 2:** The agency will apply a progressive hurdle approach to determine the best qualified candidates. Applicants who scored 90 or higher on the initial Assessment Questionnaire will be invited to complete an additional agency job knowledge assessment, which will be delivered in a testing platform outside USA Hire and will score applicants on a scale of 0 to 100 (no passing score requirement). The scores from the Manual Assessment will be the only ones used to determine applicant final scores.

Since the announcement is open under delegated examining procedures, veterans' preference applies, similar to the Scenario 4 in the [Delegated Examining Operations Handbook](#) (page 5-20) which means that:

1. Veterans' preference points need to be added to determine if a preference eligible meets the cutpoint, and
2. CP/CPS veterans who are minimally qualified are eligible to move forward even if they do not meet the cutpoint.

#### **Assessment Plan:**

- **Hurdle 1:** Assessment Questionnaire
- **Hurdle 2:** Manual Assessment

#### **Manual Assessment Information:**

- **Assessment Method:** Online/Paper-pencil Assessment
- **Assessment Method Details:** Job Knowledge
- **Screen-out:** Disabled, since the assessment will not be pass/fail, only score
- **Rating:** Enabled, since the assessment will be scored
- **Passing Score:** Disabled, since the assessment does not have a passing score requirement
- **Min Raw Score:** 0
- **Max Raw Score:** 100
- **Standardize scores:** Disabled, since each applicant's final score will be based only on the Manual Assessment results rather than in combination with the Assessment Questionnaire

#### **Hurdle Criteria:**

- Hurdle 1 has a *Hurdle Score Cutpoint* of 90
- Hurdle 2 is the only one *Used for Final Rating*

#### **Settings:**

- In the Hurdle Settings section, select *Apply Veterans' preference to hurdles*
- *Add veterans' preference points to determine if the hurdle cutpoint is met* is automatically enabled
- *"Float" eligible CP/CPS veterans to the next hurdle regardless of their score* should remain enabled unless the position is professional/scientific at the GS-9 or higher.

#### **Exporting Applicants:**

1. Create and filter an applicant list for PA candidates and adjudicate veterans' preference claims so that veterans' preference points/status can be correctly applied in determining which applicants need to move forward to the next assessment.
2. Save the applicant list and from the Gear menu choose **Export Manual Assessment File**.



**Helpful Tip:** To notify applicants who will be moving forward of any required next steps, select all PA applicants, and click **Send Notification**. You can also notify applicants who will not be moving forward by using the RSC filter for any other statuses except PA and sending them a separate notification.

# Preparing Files with Applicant Scores for Import

The system-generated export file can be used to import the applicant results to the Manual Assessment. The file will contain one row per applicant, per rating combination. For example, a GS-0201-11/12 vacancy will contain two rows per applicant; however, if an applicant selected GS-12 as their lowest acceptable grade, they would only have one row.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Vacancy ID	Assessment ID	Assessment Name	Application ID	Application Rating ID	Applicant Last Name	Applicant First Name	Applicant Middle Name	Application Number	Rating Combination	Assessment Rating	Minimum Qualifications Rating
2	11010855	37391	SME Review	46471	49269	Blair	Adeline		A6RIG-SOFS	0201-11		
3	11010855	37391	SME Review	46471	49270	Blair	Adeline		A6RIG-SOFS	0201-12		
4	11010855	37391	SME Review	46477	49279	Rivas	Lamar		A4TLA-ALL3	0201-11		
5	11010855	37391	SME Review	46477	49280	Rivas	Lamar		A4TLA-ALL3	0201-12		
6	11010855	37391	SME Review	46476	49278	Wilson	Beth		AD465-9ZE8	0201-12		
7	11010855	37391	SME Review	46474	49274	Wetmore	Maria		A59M1-Q5F5	0201-11		
8	11010855	37391	SME Review	46474	49275	Wetmore	Maria		A59M1-Q5F5	0201-12		
9	11010855	37391	SME Review	46475	49277	Agreste	Adrian		ARC9P-KJPJ	0201-12		

There are two columns within the export file that can be used to document the applicant assessment results, in preparation for importing them into USA Staffing:

1. **Assessment Rating** column entries must be numeric and fall between the **Min and Max Raw Score** values configured for the Manual Assessment. Note: Decimal points are allowed.
2. **Minimum Qualifications Rating** column entries must be one of the system-defined 4-character NOR Message Codes. A full list of NOR codes may be located [here](#).

You may enter both numerical scores and NOR codes into these columns for both eligible and ineligible applicants, so long as the criteria above are met. However, you also have the option to enter data for only one column, for example:

- For eligible applicants you can enter their numerical score in the *Assessment Rating* field, leaving the Minimum Qualification Rating blank. Once imported, the system will default the assessment-level NOR code to ELTE.
- For ineligible applicants you can enter their NOR code in the *Minimum Qualifications Rating* column (e.g., IQID) leaving the Assessment Rating blank. Once imported, the ineligible NOR code will become the applicant's minimum qualification rating for that rating combination.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Vacancy ID	Assessment ID	Assessment Name	Application ID	Application Rating ID	Applicant Last Name	Applicant First Name	Applicant Middle Name	Application Number	Rating Combination	Assessment Rating	Minimum Qualifications Rating
2	11010855	37391	SME Review	46471	49269	Blair	Adeline		A6RIG-SOFS	0201-11	15	
3	11010855	37391	SME Review	46471	49270	Blair	Adeline		A6RIG-SOFS	0201-12	12	
4	11010855	37391	SME Review	46477	49279	Rivas	Lamar		A4TLA-ALL3	0201-11	IQMA	
5	11010855	37391	SME Review	46477	49280	Rivas	Lamar		A4TLA-ALL3	0201-12	IQMA	
6	11010855	37391	SME Review	46476	49278	Wilson	Beth		AD465-9ZE8	0201-12	5	
7	11010855	37391	SME Review	46474	49274	Wetmore	Maria		A59M1-Q5F5	0201-11	IQID	
8	11010855	37391	SME Review	46474	49275	Wetmore	Maria		A59M1-Q5F5	0201-12	IQSE	
9	11010855	37391	SME Review	46475	49277	Agreste	Adrian		ARC9P-KJPJ	0201-12	24	



### Helpful Tips:

- Do not use special characters in the file name (dashes, commas, etc.) as this can interfere with the import process.
- Do not modify the data in the other columns of this file or change the file type, i.e., keep it as .csv. If you do save it as a different file type (e.g., .xls) be sure to change it back to .csv prior to import.
- If you are not ready to import scores for all applicants, you may delete row(s) from the file prior to import.
- You may also add additional columns to the file if desired, and they will not interfere with the import process, as long as the new column headers are different from the ones in the original export file, e.g., you can add new columns to store scores different panel members provided. If you do create additional columns, please be sure not to use commas in the header row. For example, “Panel Member 1” is fine, but “Chairman, Panel 1” will cause a misalignment during the import process since commas denote new columns.

When using a **Passing Score** for a Manual Assessment, USA Staffing will automatically determine if the applicant’s score falls at/above or below the passing score based on the *Assessment Rating* value as follows:

- If the score is at or above the passing score, the assessment transmuted rating will be calculated using the passing score as the minimum value for the calculation. If a NOR code is entered, it will be applied to the assessment’s minimum qualifications; otherwise, if there is no NOR code entered, the assessment minimum qualifications will default to ELTE.
- If the score is below the passing score and there is no NOR code entered, the manual assessment minimum qualifications will default to IQMA. If another ineligible NOR code is entered, it will be applied. Note: IQMA code states: You are ineligible to proceed in the hiring process because you did not attain the overall passing score on the assessment(s) for this position.

**Scenario 3:** The agency will assess all applicants who meet minimum qualifications using a third-party biodata assessment. This assessment has a possible score range of 0 to 250, and applicants must score 45 or higher to demonstrate the minimum required proficiency level for the position (i.e., “pass” the test).

#### Manual Assessment Set Up:

- **Assessment Method:** Online/Paper-Pencil Assessment
- **Assessment Method Details:** Biodata
- **Screen-out:** Enabled, since the assessment will be pass/fail
- **Rating:** Enabled, since the assessment will be scored
- **Passing Score:** Enabled, since applicants must achieve a certain score to pass
- **Min Raw Score:** 0
- **Max Raw Score:** 250
- **Passing Score Criteria:** 45, since this is the raw score applicants must meet to pass the assessment.

**Exporting Applicants:** Create an applicant list and filter for all candidates with RSC of PA

**Preparing Import File:** Enter applicant assessment scores in the **Assessment Rating** column (all 0 to 250 scores). There is no need to enter NOR codes in the **Minimum Qualifications Rating** column.

# Importing Manual Assessment Results

To import the applicant results for the Manual Assessment:

1. Open the previously created **Saved List**.
2. From the **Gear** icon, select the **Import Manual Assessment Results** option.
3. Use the **Choose File** button to locate the file on your computer and click **Import**.
4. The following message will display: “Your scores are being imported. When complete you will receive an alert.” Click **OK**.
5. Once complete, you will receive an alert indicating either the *Import Completed Successfully* or the *Import Encountered Errors*. If the system encountered problems during the import, click the alert to review more detailed information for the error(s).

If your Manual Assessment has the **Standardize scores** option disabled, then a successful import will update the applicants’ RSCs from PA to either AA or IN, as appropriate, and will finalize the applicants’ ratings.

However, if your Manual Assessment has the **Standardize scores** option enabled, then *after* the import has completed successfully, you will need to complete an additional step:

6. Click the **Gear** icon and select the **Calculate Manual Assessment Scores** option.
7. The following message will display: “Scores are calculating offline; you will receive a notification when the calculations are complete.” Click **OK**.
8. Once complete, you will receive an alert indicating that the calculation of assessment scores has been completed. At that point, applicants will no longer be in a PA status and will instead have final ratings.



## Helpful Tips:

- To prevent performance issues, please limit import files to 500 or fewer rows. If you have a larger applicant file, we recommend breaking it up into multiple files, and importing the files one at a time.
- If you discover an error with an applicant’s rating, you may correct it either by updating that applicant’s individual results in their Rating Details, or by correcting the data in the import file and importing it again. The system will only store the most recently entered/imported information.
- When standardizing scores, it is important to rate and input all applicant Manual Assessment scores, not just those of a sub-set of applicants (e.g., veterans, internal agency employees, etc.). This ensures all applicant scores are taken into consideration when determining the mean and standard deviation values and the overall applicant scores.
- If you need additional troubleshooting assistance, please feel free to submit a helpdesk ticket or contact your USA Staffing Account Manager.

# Using a Manual Assessment with a Panel Review



If your agency's Manual Assessment process involves an SME panel reviewing the applicant documents to evaluate candidate qualifications, then you can either [print multiple applicant documents in a single PDF](#) to send to the SME panel outside of the USA Staffing system, or you can leverage the **Panel Review** functionality.

Panel Reviews are useful whenever you need to send a *Stored List* of applicants to one or more SMEs. They are typically sent prior to certification and allow the SMEs, who are provided Hiring Manager user access, to view applicant documents and application information within the secure USA Staffing interface.

Panel Review assignments allow you to set the level of access for the Hiring Manager user to either:

- **View Only:** Includes the ability to review applicant information/documents and enter notes, or
- **Edit/Override Scores:** Includes the ability to review applicant information/documents, enter notes, as well as provide input on applicant qualifications and their *final* score. Note: At this time, this option is not recommended when using a Manual Assessment as a percentage of an applicant's final score (e.g., if an Assessment Questionnaire and a Manual Assessment will each be 50% of the final score).

To use a Manual Assessment with a Panel Review:

1. Create a **Manual Assessment** as part of your vacancy's Assessment Package.  
 **Helpful Tip:** Remember to complete this step before the announcement is released to USAJOBS! The option to add a new assessment to your Assessment Package is disabled after the announcement is released and opened.
2. [Create a \*\*Stored List\*\*](#) of applicants who need to be sent through the SME panel review process.
3. Create a **Saved List** of applicants and generate an **Export file** which will allow their panel review results to be saved/uploaded into their records. See the [Exporting Manual Assessment Applicants](#) section above for details.
4. Prepare and send the Panel Review to the SME panel:
  - a. Include the **Stored List** that was generated for this purpose.  
 **Helpful Tip:** You may wish to check the *Display Preferences* for your Stored List (from the *Stored List Information page*) to ensure only the appropriate applicant information will be visible to the SMEs.
  - b. Provide the Hiring Manager users with **View Only** access to the list.
  - c. Upload the applicant Export file from the Saved List to the Review's Documents area.
  - d. Include instructions and upload any applicable rating guides to the Review's Documents area.
5. The SME panel members will be able to view each applicant's documents (e.g., resume, cover letter, accomplishment records, etc.) and use the Export file to input the results/scores for each applicant.
6. Once complete, the SME panel can attach the completed spreadsheet to the Panel Review and return it to HR.
7. You can then download the file from the Review and **Import** it from the Saved List, which would update each applicant's final rating using the appropriate weights designated in the Assessment Package.



# Manual Assessment-Related Permission

The ability for HR users to view and create Manual Assessments within the USA Staffing system is permissioned for both **Assessment Packages** and **Assessment Package Templates**. The following permission settings apply in both areas:

- **View Manual Assessment** - Enables users to view content within a Manual Assessment.
- **Create/Edit Manual Assessments** - Enables users to create or edit Manual Assessments.
- **Create/Edit Assessments that standardize scores** - Enables users to create Manual Assessments where scores are standardized using vacancy level mean and standard deviation values.
- **Create/Edit Assessments that standardize w/custom values** - Enables users to create Manual Assessments where scores are standardized using custom mean and standard deviation values.
- **Apply Passing Score to Assessments** - Allows users to enable the Passing Score setting and set a minimum passing score for an assessment.

An agency's USA Staffing office administrator can enable/disable these settings, as desired, for *Custom-level* permission profiles. Most are configured as unpaid settings to allow agencies to build accounts for their assessment professionals who may not typically perform other core HR functions. This would allow them to create Manual Assessments directly within the USA Staffing system or verify the assessments were properly set up by another HR user. The *Apply Passing Scores to Assessments* permission is a paid permission setting for Assessment Packages but is an unpaid permission setting for Assessment Package Templates.

The following Manual Assessment permission settings apply for the *System-level* permission profiles for both Assessment Packages and Assessment Package Templates:

- **Office Administrator:** All Manual Assessment-related permissions are enabled
- **Standard HR User and HR Assistant:**
  - The *View Manual Assessment permission* is enabled,
  - All three *Create/Edit* permissions for Manual Assessments are disabled, and
  - The *Apply Passing Score to Assessments* permission is disabled.
- **HR View Only and Onboarding Only User:** All Manual Assessment-related permissions are disabled.

## Conclusion

We hope this guide is a helpful resource in using Manual Assessments. As mentioned in the introduction, if you are considering a new assessment process using this functionality, we recommend you try out the desired approach from beginning to end in the [USA Staffing Training](#) environment first before using it in a live vacancy. This will give you an opportunity to test each step outlined in this guide, document your business process, and make any adjustments that may be needed. If you have questions that were not answered in this guide or if you would like additional assistance in mapping your desired assessment process, please feel free to contact your USA Staffing Account Manager.