

# **USA Staffing**

# Subject Matter Expert Evaluation HR User Guide

September 2023

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**OPM** HR SOLUTIONS by government, for government

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# What Is a Subject Matter Expert Evaluation?

A Subject Matter Expert (SME) Evaluation is one of four **Assessment Types** available in USA Staffing, the other three being Questionnaire, Manual, and External (i.e., USA Hire). An SME Evaluation allows HR Users to interact directly with the SMEs who will evaluate applicants using different **Assessment Methods**.

This guide will illustrate several best practices for creating and using an SME Evaluation in accordance with the recent Executive Order, but the functionality itself is very flexible. Agencies can use it in several different ways depending on the job analysis, consultation with the selecting official, and agency internal 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.

# What Different Assessment Methods are available?

The only assessment method currently available under the SME Evaluation assessment type is the Structured Resume Review. We will add additional assessment methods as we continue to refine system functionality.

### **Structured Resume Review**

OPM defines a Structured Resume Review as a screening (pass/fail) assessment whereby a trained panel of two or more SMEs follows a systematic process to review an applicant's resume and come to agreement on whether the applicant has the required specialized experience necessary to successfully perform the job. The Structured Resume Review is intended to screen out individuals who do not have the specialized experience required. This method does not identify best qualified applicants, provide a numerical score, or determine a category rating placement.

In USA Staffing this assessment method presents applicants' resumes to each of the SMEs, one at a time, along with the specialized experience requirements (i.e., SME Evaluation Items), collects the SMEs' evaluations and justifications, sends applicant resumes to a tiebreaker SME if there are discrepancies, and presents the information in an organized way to the HR User.

A self-paced online training course (approximately 3 to 4 hours) is available to all Federal agencies at no charge through the USA Staffing Online Course Portal at <u>https://usastaffing.usalearning.net/login/index.php</u>.

HR users should also reference the SME Evaluation Assessment Methods Guide located at <u>https://help.usastaffing.gov/ResourceCenter/index.php/Resources</u> for additional information regarding SME Evaluation Assessment Methodology and the Structured Resume Review Assessment Method.



The SME Evaluation assessment type **cannot** be used in vacancies that have multiple grades, multiple series, or multiple specialties.

# The SME Evaluation

As stated in the beginning of this guide, an **SME Evaluation** is the *Assessment Type* that provides the ability to use a *Structured Resume Review Assessment Method* to carry out a Structured Resume Review in USA Staffing.

The system defaults in USA Staffing are designed for compliance with the requirements of Executive Order 13932. At a high level, a Structured Resume Review that meets the Executive Order involves the following steps:

- Two SMEs independently review an applicant's resume against each specialized experience requirement targeted for the resume review.
- Each SME independently determines whether or not the applicant meets each specialized experience requirement based on the content of the applicant's resume.
- Each SME provides a justification for each Yes/No rating.
  - When rating 'Yes' (resume reflects the required experience), SMEs indicate where in the resume they found support for their rating (i.e., year(s) experience gained, as well as position title as needed for clarity).
  - When rating 'No' (resume does not reflect the required experience), SMEs indicate that the resume
    reflects insufficient evidence of the required experience, providing justification needed to help others
    to retrace their decision.
- If the two SMEs disagree on one or more specialized experience requirement(s), a third tiebreaker SME reviews documentation from the two SMEs to make a final determination.

Important to note, although the steps outlined above reflect the system defaults and are consistent with Executive Order 13932 requirements, USA Staffing functionality offers flexibilities. The system will permit a single SME to carry out a resume review. The system also does not require SMEs to provide justifications for each rating. However, deviating from the system defaults may result in an assessment process that is not compliant with EO 13932 resulting in the need for an additional assessment prior to certification.

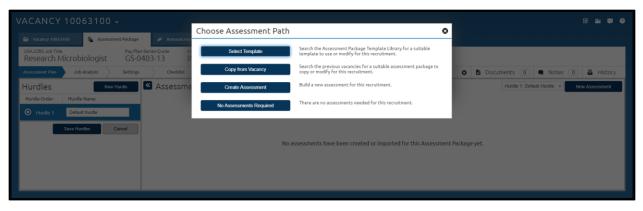
SME Evaluations can be added to an Assessment Package Template or an individual vacancy. Assessments of any type must be added to your vacancy before it is released and opened on USAJOBS. Additionally, to use the SME Evaluation functionality, your vacancy must accept and require resumes. You should also place language in the *How You Will Be Evaluated* section of the announcement that explains to the applicant any additional assessment steps that will occur after they submit their application (see sample wording in the SME Evaluation Assessment Methods Guide).

SME Evaluations can also be combined with other types of assessments in the same assessment package, including other SME Evaluations, if needed. The settings for each assessment are independent of each other and can be configured on their respective Assessment Information pages according to your agency's needs and internal business rules.

### **Assessment Package Tab**

Click the Assessment Package tab.

If there aren't any assessments in the vacancy's Assessment Package, you'll be prompted to choose an Assessment Path. Click the *Create Assessment* button. This will open the Create Assessment tab.



If there's already an assessment in the vacancy's Assessment Package, click the *New Assessment* button. This will open the Create Assessment tab.

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	usajobs job Title Research M		Pay Plan-Seri GS-040			mplete	Source												
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	O Hurdle 1	Default Hurdle		ID ~	Assessment Name			•	Assessment Type 🗧	Screen-out ¢	Rating	Pass	ng Score	Cut Score      t	Propor	tional Weight	¢ Per	centage W	/eight ¢
		Save Hurdles Cano	el C	125739	Research Microbiologist	Questionnaire			Questionnaire						1	/1	10	0%	
																Save Assessme	ents	Can	icel

#### **Assessment Information**

- 1. Enter the assessment name in the Assessment Name textbox.
- 2. Select SME Evaluation from the Assessment Type dropdown. PLEASE NOTE: The SME Evaluation assessment type is available as an option only if the vacancy contains a single rating combination, such as GS-0403-13. SME Evaluation will not appear as an option if the vacancy has multiple grades, series, or specialties. If additional rating combinations are added after the Assessment Package is completed, USA Staffing will automatically mark the Assessment Package as incomplete and prevent HR Users from completing the Assessment Package until the additional rating combinations or the SME Evaluation assessment is removed.
- 3. Select either *Structured Resume Review (EO Compliant)* or *Structured Resume Review* from the Assessment Method dropdown.
  - a. When you select Structured Resume Review (EO Compliant), USA Staffing will set the number of SME evaluations required to 2 and require evaluation justification notes for all responses. These defaults help the HR User ensure the assessment meets the intent of Executive Order 13932 (EO). Selecting this option doesn't guarantee the assessment meets the EO's intent but rather ensures the HR User is meeting minimum requirements to do so.
  - b. When you select *Structured Resume Review*, USA Staffing allows the HR User the flexibility to set the number of SME evaluations to 1 or 2, and require evaluation justification notes only for disqualifying responses, only for qualifying responses, or for all responses, according to the agency's needs. Keep in mind, however, that an assessment requiring fewer than 2 SME evaluations and not requiring justification notes for all responses will not meet the requirements of EO 13932.
- 4. The Screen-out and Rating toggles are automatically set and disabled since SME Evaluation assessment types are pass/fail and cannot be rated.
- 5. The HR User who created the assessment is auto populated as the Owner. If needed, change the Owner to a different HR User.
- 6. Select the hurdle in which you want to put this assessment.

#### 7. Click Save.

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🚔 Vacancy 10063100 🛛 👔 Assessment Package 🏾 🦽 Ann	ouncement 👍 Reviews 🖌 Create Assessment 🔸	
USAJOBS Announcement Title Pay Plan-Series-Grade Research Microbiologist GS-0403-13	Assessment ID New	
Assessment Information Competencies Assessment Question	alre Screen-Out Criteria Rating Criteria Passing Score Criteria Test Plan Checklist	🗘 🖀 History
Assessment Information		* = Required
	sment Type * Assessment Method * Evaluation * Structured Resume Review (EO Compila *	
Screen-out Rating 2	ser of SME Evaluations Required * Evaluation Justification Notes Required * * For All Responses *	
Owner * Hurd Patrick Gonsalves v Hur	e * de 1 v Df	
	Sav	e Cancel

Once you save the assessment, USA Staffing will change the tab's title to the Assessment Name, enable the remaining tabs, and lock the Assessment Type dropdown.

#### Competencies

SME Evaluation type assessments do not require the use of Competencies. If you do choose to use them, you can add them on the Competencies tab by selecting them from an existing competency network, or if you have the proper permissions, by creating them manually.

Any competencies you add to your SME Evaluation type assessment will be displayed in USAJOBS if you include a *Competencies List* or *Competencies Bullets* data insert in your announcement. If you're assessing the same competency between multiple assessments, make sure you use the same Competency ID in each of those assessments, so they aren't duplicated in the data insert list.

#### **SME Evaluation Items**

The SME Evaluation Items page is where you add the specialized experience requirements the SMEs will use when reviewing each resume to evaluate if an applicant possesses the required specialized experience. These items are based on the specialized experience requirements defined in the Job Analysis. Generally, applicants must have at least one year (52 weeks) of full-time experience equivalent to the next lower grade level in the Federal service (or comparable level of experience from outside the Federal service) to meet the specialized experience requirements.

These specialized experience requirements are not the same as the Individual Occupation Requirements (IORs) or other basic requirements for the advertised position. These may include education requirements or selective placement factors which are typically confirmed through supporting documentation such as transcripts, certifications, and licenses. HR Users should conduct this review prior to sending the SME Review. The SME will only have access to the applicants' resumes when conducting the SME Review.

Each SME Evaluation Item requires a header and a stem. The header may be the competency associated with, or an abbreviated version of, the specialized experience requirement. The stem is the specialized experience requirement phrased in a way that prompts a "yes/no" response from the SME. For example:

#### (Header) Microbiology

(Stem) Resume reflects at least one year of specialized experience equivalent to the GS-12 level planning microbiological field and laboratory investigations involving novel or difficult-to-identify pathogens.

#### Serotyping

Resume reflects at least one year of specialized experience equivalent to the GS-12 level serotyping immunebased and/or molecular assays to detect emerging threats such as viruses, bacteria, proteins and/or peptides.

#### Encapsulation

Resume reflects at least one year of specialized experience equivalent to the GS-12 level utilizing nanoparticle and/or microparticle production processes for encapsulation and/or characterization of encapsulated material.

#### Aerosolization

Resume reflects at least one year of specialized experience equivalent to the GS-12 level aerosolizing nano and/or microencapsulated material.

SME Evaluation Items can be added by importing them from the SME Evaluation Items Library or by creating them manually.

#### To Import an Item from the SME Evaluation Items Library:

- 1. Select *Add from Library* from the Add SME Evaluation Items dropdown menu. This will open the SME Evaluation Item Library search dialog box.
- 2. The series and grade filters are set by default. Enter any other search criteria as needed.
- 3. Click Search.
- 4. Select the item(s) you would like to import.
- 5. Click *Add & Close* to import the items and continue creating the SME Evaluation or *Add & Continue* to search for additional SME Evaluation Items to import.

Item Filters	Item ID	Header ÷	Text \$	Scale	Linked Competency	Screen-Ou
x 0403 - Microbiology	11	Microbiology	Resume reflects at least one year of specialized experience equivalent to the GS-12 level planning microbiological field and laboratory investigations	Resume Reflects		Yes
ж 13			involving novel or difficult-to-identify pathogens.	Experience		
Rem ID#	12	Serotyping	Resume reflects at least one year of specialized experience equivalent to the GS-12 level serotyping immune-based and/or molecular assays to detect emerging threats such as viruses, bacteria, proteins and/or peptides.	Resume Reflects Experience		Yes
Item Header or Text			detect emerging circuits soci us viruses, bacteria, proteins and/or peptides.	experience		
Апу Тад	13	Encapsulation	<br< td=""><td>Resume Reflects</td><td></td><td>Yes</td></br<>	Resume Reflects		Yes
Competency Filters			material.	Experience		
Any Competency *			Resume reflects at least one year of specialized experience equivalent to the GS-12 level aerosolizing nano and/or microencapsulated material.	Resume		
Linked Competency Title	14	Aerosolization		Reflects Experience	Yes	
Linked Competency ID#						
Search						

#### To Create an Item Manually:

- 1. Select *New Item* from the Add SME Evaluation Items dropdown menu. This will open the Add SME Evaluation Item dialog box.
- 2. Enter text for the Header.
- 3. Enter text for the Item stem.
- 4. Both the Screen-out Question and Response Required toggles are toggled on by default.
- 5. The response type is set to Multiple Choice Single Select by default.
- 6. The scale is set to Resume Reflects Experience by default.
- 7. Click Save & New to add additional SME Evaluation Items or Save & Close if there are no additional items to add.

Header * Microbiology		
microbiology		
Item Text •		
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Resume reflects at least one year of specialized experience equ	ivalent to the GS-12 level planning microbiological field and laboratory investigations involving novel or difficult-to-identify pathogens	I
Screen-out Question	Link to Competency None *	
Response Required	Scale	
Response Type * Multiple Choice - Single Select *	Scale Resume Reflects Experience *	
Resume Reflects Experience Details		
+ Indicates whether the applicant's resume reflects the require	ed experience.	
	Save & New Save & Close	Cancel
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2003100     Assessment Package     Announcement     Review       Ourcomment Title     Pay Pain-Geries-Grade     Assessment ID       1 Microbiologist     CS-0403-13     Assessment ID       1 Microbiologist     Sorter-Out Offeries     Te       valuation Items (4 Items)     Sorter-Out Offeries     Te       2 Serotyping     Resume reflects at least one year of specialized experience equivalent to the repetitive.       3 Encepsulation       Resume reflects at least one year of specialized experience equivalent to the repetitive.	Assessment: Research Microbiologist SHE Evaluation     Checklist     Chec	G

#### **Screen-Out Criteria**

Each SME Evaluation Item is a Screen-out Question, so each one will need its own Screen-out Criteria. The HR User adds these on the Screen-Out Criteria page. To add a Screen-out Criteria:

- 1. Click the Add Screen-Out Criteria button. This opens the Add Screen-Out Criteria dialog box.
- 2. Enter the name of the screen-out. (Helpful tip: to keep things organized, use the SME Evaluation Item Header as the name for the screen-out.)
- 3. Select the Ineligibility Code. The default code is *IQSM* You are ineligible for this position because subject matter experts have determined you do not meet the required qualifications as described in the job announcement.
- 4. Select the item from the item dropdown.
- 5. Select the disqualifying response.
- 6. Click Save & Close.
- 7. Repeat for all SME Evaluation Items.

Name *			Apply Screen-Out to Rating Combinations		ineligibility Code *		
Microbiol	logy		0403-13		IQ5M - You are ineligible for this position because	subject matter experts have determine	
<ul> <li>Add a above</li> </ul>	all Items that should be considered in this Screen-Out e.	t. Then, select all Resp	onse Options that should disqualify applicants for the selected Rating Comb	inations. Remember that the selected Iten	is and Response Options should be specific to the F	Rating Combinations selected	ıdd lltem
	item 1. Resume reflects at least one ye	ear of specialized exp	rience equivalent to the CS-12 level planning microbiological field and labor	atory investigations involving novel or diff	icult-to-identify pathogens.	0	
	Response Options						
	· •	A	Resume reflects this experience Resume does not reflect this experience				
		8	Resume does not reriect this experience				
🔮 Qualifyi	ing Response 🙁 Disqualifying Response					Save Save & Close	Cancel
	3100 ~ Assessment Package Announce	ement 🤞	Reviews 🗸 Assessment: Research Microbiologist SME Ev	aluation +			2
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#### Test Plan

The Test Plan page is where the HR User ensures the screen-outs are correctly configured through various test scenarios. To create a scenario:

- 1. Click the Add Scenario button. This opens the Add Scenario dialog box.
- 2. Enter a name for the scenario, such as *ELTE* or *IQSM*, depending on the desired result.
- 3. Select the expected rating. The options here will be ELTE and all the ineligibility codes you entered when creating your screen-out criteria.
- 4. For each item, select the response that will result in the Expected Outcome.
- 5. Click Save to preview the Actual Outcome.
- 6. If the Expected Outcome matches the Actual Outcome (there will be a green checkmark), click *Save & Close*. If they don't match (signified by a red X), adjust the results until they do.

Add	Scenario						0
Scenar ELTE Outo	romes						
_ Item	Rating Combo 0403-13 * Responses	Expected Rating ELTE	(n)		Ψ		Actual Rating
Item	Resume reflects at least one year of specialized e	experience equivalent to the GS-12 level planning m	Response	4,	material.		ast one year of specialized experience equivalent to the CS-12 level aerosolizing nano and/or microencapsulated
• 2	Resume reflects at least one year of specialized e	experience equivalent to the GS-12 level serotyping	А	۲	A	Resum	is erefiects this experience
• 3		experience equivalent to the GS-12 level utilizing	A	0	В	Resum	e does not reflect this experience
• 4	Resume reflects at least one year of specialized e microencapsulated material.	experience equivalent to the GS-12 level aerosolizing nano and/or	A	0		Failed	to respond
							Save Save & Close Cancel

USA Staffing only requires one passing test scenario to complete the assessment, but a best practice is to create a qualifying (i.e., ELTE) and at least one disqualifying (i.e., IQSM) scenario. Regardless of the number of scenarios you create, all must have green checkmarks.

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JSAJOBS Announcement Research Microl								
ssessment Information	Competencies SME Evaluation	ams Screen-Out Criteria	Test Plan	Checklist				History
Test Scenarios	; (5)							Add Scenario
Scenario			\$	Responses ¢	Rating Combo	Expected Outcome	Actual Outcome	
ELTE				A, A, A, A	0403-13	ELTE	O ELTE	
IQ5M - Microbioł	ogy			B, A, A, A	0403-13	IQSM	IQSM	
IQSM - Serotypin	g			A, B, A, A	0403-13	IQSM	IQ5M	
IQ5M - Encapsula	tion			A, A, B, A	0403-13	IQSM	IQ5M	
IQSM - Aerosoliza	ation			A, A, A, B	0403-13	IQ5M	IQ5M	

#### Checklist

The Checklist page performs some behind-the-scenes validations to make sure the SME Evaluation Assessment is configured correctly. If your assessment passes, you'll see all green checkmarks. If there's something wrong, you'll see a red X. You'll have to fix each issue before you can move on to the rest of the assessment package.

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🖆 Vacany 1002100 🐚 Aussiment Package 🍬 Announcement 👍 Reviews 🗸 Assessment: Research Microbiologist Soft Evaluation +	
USAUBS Announcement Title Pay Plan-Series-Gade Assessment ID Research Microbiologist GS-0403-13 125740	
Assessment Information > Competendes > SHE Bealastion Rema > Spread-Out Offenia > Test Plan On-Allist	🗢 🖀 History
Assessment Checklist	
Screen-out item 4 does not have a screen-out criteria.     All Items have at least two Response Options.     All teast one test scenario failed.	
	Continue

There is also the possibility you'll see an orange exclamation point. If you see this, it's not an error. It just means you've selected an option that OPM doesn't recommend, such as using fewer than two SMEs (as shown here). If it's intentional, you can move forward with the rest of the assessment package.

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🖀 Vacancy 10063100 🐚 A				✓ Assessment: Research Microbiologist SME Evaluation	+	
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Assessment Information Competent	encies SME Evaluation Items	s Screen-Out Criteria	Test Plan	Checklist		🗘 🚔 History
Assessment Checkli	st					
<ul> <li>Although agencies have</li> <li>All items have at least t</li> <li>Assessment is tested.</li> </ul>		E for an applicant evalu:	ation, OPM recom	nends the use of multiple SNEs.		
						Continue

Once your checklist shows all green checkmarks, click the *Continue* button to return to the assessment package.

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🖀 Vacancy 10063100 🐚 Assessment Package 🖌 Announcement 👍	Reviews 🗸 Assessment: Research Microbiologist SME Evaluation 🕈	
USAJOBS Announcement Title Pay Plan-Series-Grade Assessment ID Research Microbiologist GS-0403-13 125740		
Assessment Information Competencies SME Evaluation Items Screen-Out Criteria	Test Plan Checklist	🖶 History
Assessment Checklist		
<ul> <li>All Items have at least two Response Options.</li> <li>Assessment is tested.</li> </ul>		
		Continue

### **Completing the Assessment Package**

At this point, you are finished creating the SME Evaluation assessment. You are now free to add additional assessments and hurdles, if needed, or complete the assessment package and continue with the announcement.

### **The SME Review**

The Reviews page is where you create a review or access an existing review. To create a Subject Matter Expert (SME) Review, select *Subject Matter Expert (SME)* from the Create Review drop down menu:

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🚆 Vacancy 10063100	Assessment Package	i Announcement	👍 Reviews	•	
Reviews 0					Create Review •
All Review Types	* All Revie	w Statuses 🔹			Review Applicant List
					Job Opportunity Announcement (JOA)
					Panel Review
					Subject Matter Expert (SME)
				No reviews Found	

### **Review Information**

The Review Information page is where the HR User adds basic information about the review such as the review's name, due date, and any instructions needed.

- 1. Enter a name for the review, such as Research Microbiologist SME Review or some other description.
- 2. Select the SME Assessment that will be used for this review. If there is only one SME Assessment, that assessment will be auto populated.

**i** Each SME Evaluation Assessment tied to a vacancy can be sent only once on a review. The same SME Evaluation Assessment cannot be sent on more than one review per vacancy.

- 3. The HR User who created the review is auto populated as the Owner. If necessary, change the Owner to the appropriate HR User responsible for receiving the returned review.
- 4. Select a Due Date.
- 5. The Review Instructions are standard and auto populated.
- 6. Click Save.

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🖀 Vacancy 10063100 🛯 💺 Assessment Package 🏾 🥔 Announcement 👍 Reviews	عد Applicant Overview 🔥 Review: Research Microbiologist SIME Review Test 2 +
Review Name Research Microbiologist SME Review Test 2	ert (SME) Not Sent 3/20/2023
Review Information Review Assignments Evaluations	🗘 🖨 History
Review Information	* = Required
Assessment: * 1. Loo ead Research Milcrobiologist SME Evaluation * 2. For Owner: * 3. Pro- Patrick Consalves * will 4. Clic	ructions: ng a resume review involves the following steps: ook for eidence of each pre-defined specialized experience requirement in the applicant's resume. Evaluate the resume based on the experience presented relative to ch pre-defined specialized experience requirement, rather than looking for key words. or each specialized experience requirement, select the appropriate response based on whether the applicant's resume reflects the required experience. rovide the appropriate justification for each determination. If the applicant's means desprise department, indicate where in the resume you found support for yor determination (i.e., year(i) experience gained, as well ap soliton tit is an needed for farity; i) the applicant's means does not reflect the required experience, you all see text auto-populate (i.e., "Resume reflects insufficient evidence of"). Provide additional justification as needed to help others retrace your decision. It's Finish Evaluation to save your evaluation and review the next applicant. A new applicant record will open for your review. You may stop at any time by clicking Exit eviews.
	Save Delete

#### **Review Assignments**

The Review Assignments page is where you select the SMEs who will conduct the Structured Resume Review. HR Users should ensure they are only selecting Hiring Manager Users who have received the proper training and are qualified to act as an SME in this context. USA Staffing does not automatically add the requester as one of the reviewers, because they might not be considered an SME. HR users may still manually assign the Requester if they would like the Hiring Manager to be involved in the review process Add as many SMEs, including tiebreakers, as needed. To add a Reviewer:

- 1. Click the Add Reviewer button.
- 2. In the Add Review popup window:

i

- a. Select the customer with which the Reviewer's account is associated.
- b. Hiring Manager User is checked by default.
- c. Enter the First Name, Last Name and/or E-mail address used to create the account.
- d. Click Search. Search results will appear in the right side of the popup window.
- e. Click the *Add* button to indicate that person should be added as Reviewer.

If the individual does not appear in the search results, try adjusting your search criteria. If they still do not appear, you will need to confirm they have an account in USA Staffing before proceeding.

- f. Repeat the above steps as many times to add the necessary number of Reviewers.
- g. Click Save & Close after selecting all your Reviewers

Add Reviewers							0
Filters	Name	* E-mail	٥	User Type(s)			
Customer A *	Automated Heinz	automatedstaffingtest+1861@gmail.com		Human Resources User, Hiring Manager User, and Onboarding User	Add		
Hiring Mahager User Human Resources User Onboarding User	Briana Heinz	briana.heinz@opm.gov		Human Resources User and Hiring Manager User	Add		
First Name							
Heinz							
E-mail							
Search							
Reviewers to Add (0)							
						Save & Close	Cancel

- 3. From the Review Assignments page, indicate if one or more of the Reviewers will act as a Tiebreaker Only by checking the appropriate *checkbox* for that Reviewer. Although they are not required, if a Tiebreaker Only is identified, they will only be presented with an applicant if two SMEs disagree on one or more SME Evaluation Items. If no Tiebreaker Only SME is identified, one of the other SMEs will perform the tiebreaker evaluation provided they were not one of the original two SMEs.
- 4. If you need to remove a Reviewer, click the *trashcan icon* on the far-right side of that Reviewer's entry. Once an SME starts an evaluation, you won't be able to remove any SMEs from the review, but you can always add additional SMEs if the need arises.
- 5. Click Send Review.

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Review A	ssignments								Add Reviewer
Status Re	viewer Name	e Phone		Email		tiebreaker Only	٥	Inactive	٥
😒 в	riana Heinz	202-00	0-0000	briana.heinz@opm.gov					
😢 к	eith Schweitzer	00000	00000	keith.schweitzer2@opm.gov			C <sub>2</sub>	0	
	atrick Gonsalves	(202)	18-8526	patrick.gonsalves@opm.gov				0	

After sending the review, if an SME Reviewer changes roles, leaves the organization, or for any other reason should not be involved in the review, HR users can mark the SME Reviewer as "Inactive". An "Inactive" SME Reviewer will no longer be assigned new evaluations but remain available to correct justifications as needed. It is not recommended that HR mark SME Reviewers as "Inactive" simply because they are unavailable temporarily.

### **Evaluations**

HR Users can monitor the SMEs' progress in the Evaluation Progress and Overview sections of the Evaluations page. These sections display the total number of SME Evaluations tied to the review, how many tiebreaker evaluations are needed, and the ratio of applicant evaluations completed, as well as progress bars showing the number of evaluations in each status.

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Applicant	Evalu	ation Status	Evaluated	Ву				<ul> <li>History</li> <li>History</li> <li>1/3</li> </ul>	
All Applicants	Vacang UBORT Rekeya Warang UB								
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				No SME Eva	luations Found				

#### **The Evaluation Progress Section**

This section tracks SMEs as they progress through the evaluations. The evaluation statuses are defined as:

• Not started: an SME Reviewer has not opened the evaluation.

- In Progress: an SME Reviewer has opened the evaluation and is actively working. SME Reviewers are given four hours to complete each applicant's evaluation. A reminder will appear showing the time remaining. If an evaluation is not completed in the allotted time, that applicant will be reassigned to another SME.
- **Returned to SME:** an HR User has returned the evaluation to an SME Reviewer requesting an amendment or clarification. The SME Reviewer can only update their justification notes, they cannot change their overall determination.
- **Pending HR Review:** an SME Reviewer has completed their evaluation of that applicant. The system then adds the evaluation to a queue for the HR User to review. The HR User will review the evaluation to ensure the SME justifications are complete and match the determination. The HR User does not need to perform an additional qualifications review.
- Accepted by HR: an HR User has reviewed and accepted the evaluation.

#### The Overview Section

This section shows the expected number of evaluations and tiebreakers needed to complete the review.

- **SME Evaluations:** the total number of evaluations required for the entire review based on the number of SME Evaluations required per applicant. As an example, if the HR User selects two SME Evaluations are required for each applicant, and there are three applicants, at a minimum six SME Evaluations will be required to complete the review.
- **Tiebreaker Evaluations:** the total number of evaluations where there is disagreement between the SMEs on one or more SME Evaluation Items per applicant. For example, if there are four SME Evaluation Items and the two SMEs disagree on two of those items, a single tiebreaker evaluation will be generated.
- **Applicants Completed:** the total number of Applicants where an HR User has reviewed and accepted all required evaluations and tiebreakers.

Evaluations in a Returned to SME, Pending HR Review, or Accepted by HR status will be shown below the Evaluation Progress and Overview sections. HR Users can filter these results by Applicant Name, Evaluation Status, or SME Reviewer.

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Review Name Research Microbiologist SME R	eview Subject Matter Expert (SM	1E) Active 3/31/2023		
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SME Evaluations				
Evaluation Progress			Overview	
SME Evaluations  Evaluation Progress Not Started In Progress Returned to SME Accepted by HR 0  Accepted by HR 0  Accepted to HR 1 All Applicant All Applicant Name  + Jeffrey Lebowski + Walter Sobchak + Donny Kerabatsos + Jeffrey Lebowski + Jeffrey Lebowski	1 1	4	<b>6</b> SIME Evaluations <b>0</b> Tiebreaker Evaluations	<b>O</b> /3 Applicants Completed
Applicant	Evaluation Status Evalu	ated By		2
All Applicants 🔹		valuators *		
Showing 1-4 of 4				
Applicant Name	Evaluation Date	Evaluated By	Evaluation Status	
+ Jeffrey Lebowski	03/21/2023 01:12 PM	Patrick A. Gonsalves	Pending HR Review	
+ Walter Sobchak	03/21/2023 01:13 PM	Patrick A. Gonsalves	Pending HR Review	
+ Donny Kerabatsos	03/21/2023 01:13 PM	Patrick A. Gonsalves	Pending HR Review	
+ Jeffrey Lebowski	03/21/2023 01:14 PM	Kylie Sullivan	Pending HR Review	

Once an SME Reviewer submits an evaluation, the HR User will need to review it and either accept it or return it to the SME so they can amend one or more justification notes. An SME will not be able to change their determination on a returned evaluation, only amend their justification notes. To accept or return an evaluation:

- 1. Click the + next to the applicant's name to expand the evaluation.
- 2. To accept the SME's evaluation, click the *Accept* button which will initiate the rating process.

Applicant Name	cant Name Evaluation Date		Evaluation Status
– Jeffrey Lebowski	03/21/2023 01:12 PM	Patrick A. Gonsalves	Pending HR Review
Evaluation Criteria	Determination	Justification	
Microbiology	Resume reflects this experience		pecialized experience equivalent to the CS-12 level oratory investigations involving novel or difficult-to-
Serotyping	Resume reflects this experience		pecialized experience equivalent to the CS-12 level ecular assays to detect emerging threats such as viruses,
Encapsulation	Resume reflects this experience		pecialized experience equivalent to the GS-12 level ticle production processes for encapsulation and/or rial.
Aerosolization	Resume reflects this experience	Resume reflects at least one year of s aerosolizing nano and/or microencaps	pecialized experience equivalent to the G5-12 level ulated material.
Accept Return to SME	]		

3. To return the evaluation to the SME so they can amend their justification notes to provide more information, click *Return to SME*. This will open the Return to SME Reason pop-up. Enter the reason for returning the evaluation, instructions to the SME, or both, then click *Send*.



Once the HR User has accepted all the SME Evaluations, the SME Review is considered complete, and the HR User can move on to the next steps in their recruitment process.

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+ Walter Sobch	ak	03/21/2023 01:	13 PM	Patrick A	A. Gonsalves	Pendi	ng HR Review			٦