



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT  
Washington, DC 20415

The Director

Tuesday, November 27, 2001  
MSG 2001-105

**MEMORANDUM FOR: Human Resources Directors**

FROM: Richard A. Whitford Acting Associate Director for Employment

Subject: Assessment Options for Clerical Positions

In May, the Office of Personnel Management (OPM) changed the Qualification Standards for Clerical and Administrative Support Positions by removing the test requirement. OPM made this change to provide agencies the flexibility needed to compete in a tight labor market. The purpose of this memorandum and the accompanying fact sheets is to provide agencies with additional information regarding their assessment options. Three new assessment options available to agencies through OPM's reimbursable services are highlighted.

As indicated in earlier correspondence to agencies (see [Attachment 1](#)), under the revised Qualifications Standards, agencies may use a commercially developed test, a rating schedule/crediting plan, a work sample, a structured interview, or a combination thereof. OPM provides several clerical assessment options for agencies through its reimbursable services. Commonly used assessment options, described in the current OPM Pricing Guide, include rating schedules and the existing clerical tests, Test 800 and 801A.

In an effort to help agencies identify and hire the most qualified applicants for Clerical and Administrative Support positions, OPM also has developed three new assessment options: the Administrative Support Assessment (ASA, Test 850), a structured interview, and work sample assessments. The ability of these assessment tools to predict an applicant's future job performance is among the highest of all assessment tools. These innovative assessment options, including pricing information, are described in detail in Attachments [2](#), [3](#) and [4](#).

There are many factors to consider when selecting an assessment tool. The most appropriate assessment tool or combination of assessment tools in a given situation will depend on factors such as: (a) the grade level of the position; (b) the work requirements of the job; (c) the anticipated number of people applying for the job; (d) the competencies to be measured by the assessment(s); (e) the cost of hiring a poor performer; (f) the resources available to purchase or develop and administer the assessment; and (g) time available to fill the position. As with any assessment, meeting professional assessment standards (ensuring the legal defensibility of an assessment strategy) is also important in selecting an assessment tool. [Attachment 5](#) presents the advantages associated with various clerical assessment options, as well as some common hiring conditions under which they may be most useful.

We are interested in learning about your agency's specific assessment needs and in working with you to implement an effective assessment strategy. We invite you to contact your local OPM Service Center or Customer Service Office at <https://www.opm.gov/services-for-agencies/assessment-evaluation/> if your agency is interested in exploring the use of any of the assessments that we offer.

## Attachment 1

The Office of Personnel Management has approved a change to the Qualifications Standards for Clerical and Administrative Support Positions. To afford agencies as much flexibility as possible to compete in this tight labor market, effective immediately the written test requirement for these positions is eliminated. Experience and education requirements are unchanged.

When making appointments under a delegated examining authority, or using outside the register selection procedures under 5 CFR 333, agencies may use any of the following individually or in combination to assess the qualifications of applicants for clerical and administrative support positions:

- Commercially available written tests,
- Rating schedules and crediting plans,
- Work samples,
- Structured interviews, or
- Examining services provided by the Office of Personnel Management.

### Clerical and Administrative Assessment Options

**Commercially developed test.** Agencies may use any commercially developed test, as long as it is valid and meets the professional standards in the Uniform Guidelines on Employee Selection Procedures (29 CFR 1607, <https://www.govinfo.gov/content/pkg/CFR-2018-title29-vol4/xml/CFR-2018-title29-vol4-part1607.xml>).

**Rating Schedule/Crediting Plan.** Raters evaluate a candidate's job-related competencies, knowledge, skills and abilities by reviewing the candidate's experience, education, and accomplishments against a set of pre-determined, job-related benchmarks.

**Work Sample.** Examiners rate candidates on their performance using exercises that simulate tasks which have been determined (through job analysis) to be important to success in the position to be filled.

**Structured Interview.** Interviewers ask candidates a set of standardized, job-related questions and rate the candidates' responses based on pre-determined, job-related criteria. These benchmarks provide specific examples of high, medium, and low levels of proficiency.

OPM can provide the following examining services:

*Case examining* uses an automated staffing system. The automated staffing system develops the vacancy announcement, supplemental qualifications statement and rating schedule; posts the announcement on USAJOBS; mails application materials; determines minimum qualifications and rates applicants; conducts quality review, issues applicant notices; produces and audits a list of eligible candidates; and answers applicant inquiries.

***Inventory-based examining*** produces multiple lists of eligible candidates. OPM updates candidate information; opens/closes the inventory based on need of the requesting agency; mails application materials; receives and reviews applications; determines minimum qualifications and rates applicants; conducts quality review; issues applicant notices; produces lists of eligible candidates; and answers inquiries regarding candidate eligibility.

***Examination administration*** covers the administration of a written examination. OPM manages all logistical details relating to test site selection, competitor scheduling, scoring and issuance of competitor results. Upon request, OPM can also issue a referral list.

***Test material*** developed by OPM is also available but must be administered by individuals trained and certified by OPM as test administrators/examiners. Delegated Examining Units may order test materials for one-time use from OPM Service Centers.

***Structured interview*** training and question development are available through OPM.

For more information on services available through OPM, please refer to the following web-site:

<https://www.opm.gov/services-for-agencies/> and  
<https://www.usajobs.gov/>

## Attachment 2: ADMINISTRATIVE SUPPORT ASSESSMENT

### *What is the Administrative Support Assessment?*

The Administrative Support Assessment (ASA, Test 850) is a new test designed to identify the best-qualified candidates for public sector Clerical and Administrative Support positions. The ASA is based on a *whole-person approach* to assessment -- measuring competencies such as Reading and Reasoning, as well as critical social and motivational competencies such as Conscientiousness, Interpersonal Skills, Self-Management, and Customer Service. Administration options for the ASA include paper-based and web-based delivery.

### **Strengths of the Administrative Support Assessment**

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- Measures those competencies identified as most critical for Clerical and Administrative Support positions on the basis of a large-scale occupational analysis.
  - Measures social and motivational competencies in addition to traditional cognitive-based competencies.
  - Serves as a strong predictor of performance in Clerical and Administrative Support positions as evidenced by a recent validation study (corrected validity coefficient = .57).
  - Meets professional test development guidelines and standards, including the Uniform Guidelines on Employee Selection Procedures and the Standards for Educational and Psychological Testing.
  - Facilitates selection of a diverse workforce; validation study results support the fairness of the test based on adverse impact and bias analyses
  - Use of a valid selection tool translates into a higher return on investment and tremendous cost savings for the organization by identifying the best applicants.
  - The benefit (dollar value) associated with using the ASA over assessments demonstrating lower validity is estimated to be in the millions based on utility analysis and typical public sector hiring scenarios for Clerical and Administrative Support occupations.
  - Competency-based selection is shown to increase individual and organizational productivity and to reduce the number of "bad hires."
  - OPM's research and documentation provide defensibility against possible legal challenges when the test is used appropriately.
  - The ASA is competitively priced.
  - The ASA serves as an efficient and effective means of selecting employees, particularly with large numbers of applicants.
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### *Return on Investment Considerations*

#### *Test Features:*

- Measures 11 competencies: *Reading, Writing, Speaking, Arithmetic/Math Reasoning, Reasoning, Conscientiousness, Integrity/Honesty, Interpersonal Skills, Self-Management, Teamwork, and Customer Service.*
- Includes 5 test parts: *Vocabulary, Reasoning, Mathematical Reasoning, Life Experience and Situational Judgment.*
- Requires approximately 2 hours to administer.

For more information about the Administrative Support Assessment, contact your local OPM Service Center or Customer Service Office at:

<https://www.opm.gov/services-for-agencies/assessment-evaluation/>

#### *Pricing Information*

<b>Testing Option</b>	<b>Description</b>	<b>Price</b>
A. Testing with Certification	Includes administration of a written test for up to 30 competitors. OPM will manage all logistical details relating to test site selection, competitor scheduling, scoring and issuance of competitor results. This option also includes issuing a certificate of eligibles.	\$855 <sup>*=</sup>
B. Test Administration	Includes administration of a written test for up to 30 competitors. OPM will manage all logistical details relating to test site selection, competitor scheduling, scoring, and issuance of competitor results.	\$590 <sup>*</sup>

Testing Option	Description	Price
C. Test Material	Includes agency use of OPM-developed test material by a certified agency test administrator. This price applies for material for up to 30 competitors. Test materials are ordered for one-time use through the local OPM Service Center. They must be returned within 30 days of the test date.	\$415
D. Scanning & Scoring	For all testing options, costs for scanning and scoring services, whether provided by the Service Center or the Macon Technology Support Center, must be added to the session price. They are not included in the Testing Option Prices. These additional charges apply regardless of the number of competitors.	\$1.70 (per answer booklet)
E. Issuing Notice of Results	For all testing options, costs for issuing notice of results (NORs), whether provided by the Service Center or the Macon Technology Support Center, must be added to the session price. They are not included in the Testing Option Prices. These additional charges apply regardless of the number of competitors.	\$1.60 (per NOR)

**Note.** Prices shown are for paper-based administration only. Web-based administration is available at an additional cost.

\* Space rental costs and any out-of-the-ordinary staff travel costs must be added to the per session price.

= This price applies whether or not referral is made from an inventory or a case exam. The price also applies whether OPM certifies from an open or a closed inventory or whether OPM conducts a special test for a specific agency.

## Attachment 3: THE STRUCTURED INTERVIEW

### What is a Structured Interview?

A structured interview is an evaluation of a candidate's job-related competencies using a standardized set of questions. All candidates are asked to respond to the same series of questions, which are scored systematically by trained raters. Responses are scored using standardized criteria or benchmarks. Benchmarks, written in behavioral terms, provide specific examples of what constitutes high, medium, and low levels of proficiency for a given competency. Structured interviews can be used to measure a wide range of general and technical competencies, such as Oral Communication, Problem Solving, Interpersonal Skills, Teamwork, Flexibility, Information Management and Technology Application.

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#### *Strengths of the Structured Interview*

- Questions and evaluation criteria are directly related to job requirements as determined by a large-scale occupational analysis conducted by OPM.
- The structured interview assesses both general and technical competencies, allowing agencies to implement a *whole-person approach* to assessment.
- The ability of this tool to predict an applicant's future job performance is among the highest of all assessment tools.
- The structured interview shows low adverse impact against minority groups
- Applicants view this assessment tool as fair and related to the job.
- The panel of trained raters, consensus process, standardized evaluation criteria, and thorough documentation ensure defensibility against possible legal challenges.
- Resources needed to implement a structured interview are minimal in comparison to the long-term costs of hiring an unqualified applicant.
- The structured interview is flexible; its modular format allows agencies to tailor the interview, using different competencies for different occupations as needed.

#### *Pricing Information*

The costs for developing structured interview questions and scoring benchmarks depend upon an agency's specific requirements. Development costs for a given occupation typically range from \$3,000 to \$10,000. Use of a structured interview requires panel members (raters) to attend one full day of hands-on structured interview training. The one-day training session (up to 25 attendees) costs \$2,500 and covers the following topics:

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- Difference between Conventional and Structured Interviews
  - Benefits of the Structured Interview
  - Overview of the Structured Interview
  - Creating the Structured Interview
  - Creating the Structured Interview
  - Conducting the Structured Interview
  - Basis for Rating the Applicant
  - Documentation Guidelines
  - Rating Guidelines and Scoring the Applicant
  - Consensus Building Fundamentals
  - Common Rater Pitfalls
  - Summary: Constraints/Strengths & Recommended Practices
  - Practice Interviews

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***\*For more information, contact your local OPM Service Center or Customer Service Office at:***

***<https://www.opm.gov/services-for-agencies/assessment-evaluation/>***

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## Attachment 4: THE WORK SAMPLE ASSESSMENT

### What is a Work Sample Assessment?

A work sample is an evaluation of a candidate's job-related competencies based on a specific work activity or simulation of a work activity. Work samples are "hands-on" assessments that require the applicant to perform one or more job tasks. For example, an applicant may be given a marked-up document and asked to prepare the final version. An applicant also may be asked to participate in a simulated telephone conversation with a customer. Aspects of the work process, the outcome, or both are observed and scored in a standardized manner. Work sample assessments are appropriate for measuring a wide range of general and technical competencies required in Clerical and Administrative Support occupations, such as Applying Technology to Tasks, Customer Service, and Writing.

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#### *Strengths of the Work Sample Assessment*

- Captures Complex performance skills, such as computer skills, office skills, writing skills, and telephone skills.
- Assesses job tasks directly related to the position.
- Serves as one of the strongest predictors of future job performance.
- Prevents applicants from being able to fake or falsify responses.
- Shows low adverse impact against minority groups.
- Viewed as fair by applicants who can easily see the connection between the assessment and the job.

#### **Examples of Work Sample Assessments**

- Computer software applications (e.g., MS Word, MS Excel, Access)
- Document proofing, editing, filing, checking, and coding
- Bookkeeping practices and methods
- Posting and record keeping
- Inventory procedures

#### *Pricing Information*

The costs for developing work sample assessments will vary due to the wide variety of work sample assessments that are available. OPM has two strategies for assisting agencies in implementing work sample assessments:

##### **1. Development of Work Sample Assessments**

Agencies can contract with OPM's Personnel Resources and Development Center (PRDC) to develop and validate work sample assessments.

##### **2. Selection of Work Sample Assessments**

Agencies can contract with PRDC to help them identify psychometrically sound off-the-shelf work sample assessments from commercial vendors. PRDC psychologists can evaluate the assessments in terms of their psychometric qualities and appropriateness for specific occupations and hiring scenarios. PRDC psychologists can conduct validation research and set cut-scores for the assessments.

Whether PRDC develops the work sample or assists an agency in selecting an appropriate work sample from a commercial vendor, many assessments can be administered via the Internet. OPM can provide administration, scoring, and reporting services to meet an agency's specific needs. Assessments can be administered locally by a Delegated Examining Unit (DEU), by an OPM Service Center, or by the vendor at their satellite locations. With computerized scoring, results can be immediately available to the DEU or processed through USA Staffing individually or in combination with other clerical assessments.

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*For more information, contact your local OPM Service Center or Customer Service Office at: <https://www.opm.gov/services-for-agencies/assessment-evaluation/>*

**Attachment 5:  
Advantages and Possible Applications of Current OPM Clerical and Administrative  
Support Assessment Options**

Assessment Tool	Advantages	Possible Applications
<p><b>A. Rating Schedule</b></p>	<ul style="list-style-type: none"> <li>• Inexpensive to develop</li> <li>• Can be developed and scored quickly</li> <li>• Easily adapted to an automated environment</li> <li>• Wide variety of competencies can be assessed</li> <li>• Appropriate for all grade levels</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of hiring a poor performer is low</li> <li>• Limited resources available for hiring</li> <li>• Position needs to be filled immediately</li> <li>• Position has high turnover</li> <li>• Large volume of applicants◊</li> <li>• Use as a first-level screening tool</li> </ul>
<p><b>B. Test 800/801A</b></p>	<ul style="list-style-type: none"> <li>• Predictive validity is traditionally high</li> <li>• Measures perceptual accuracy and speed (e.g., important for filing, coding, data entry) in addition to cognitive competencies</li> <li>• Serves as a highly objective method of assessment</li> <li>• Relatively inexpensive to administer</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of hiring a poor performer is high</li> <li>• Large volume of applicants</li> <li>• Limited resources available for hiring</li> <li>• Job duties are centered around tasks requiring perceptual accuracy and speed (e.g., filing, coding, data entry)</li> <li>• Use as a first-level screening tool or as only screening tool (grades 2-4)</li> </ul>
<p><b>C. Administrative Support Assessment (ASA, Test 850)</b></p>	<ul style="list-style-type: none"> <li>• High predictive validity based on recent validation study</li> <li>• Measures critical social and motivational competencies in addition to cognitive competencies</li> <li>• Serves as a highly objective method of assessment</li> <li>• Easily adapted to an automated environment</li> <li>• Appropriate for grade levels 2 through 8</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of hiring a poor performer is high</li> <li>• Large volume of applicants</li> <li>• Assessment of a wider array of competencies is desirable</li> <li>• Use as a single screening tool or as first-level screening tool</li> </ul>

Assessment Tool	Advantages	Possible Applications
<b>D. Structured Interview</b>	<ul style="list-style-type: none"> <li>• High predictive validity</li> <li>• Viewed as fair and job-related by applicants</li> <li>• Low adverse impact</li> <li>• Wide variety of competencies can be assessed</li> <li>• Appropriate for all grade levels</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of hiring a poor performer is high</li> <li>• Smaller volume of applicants</li> <li>• Assessment of a wider array of competencies is desirable</li> <li>• Use as a second-level screening tool or as a single screening tool</li> </ul>
<b>E. Work Sample</b>	<ul style="list-style-type: none"> <li>• High predictive validity</li> <li>• Viewed as fair and job-related by applicants; reflects 'look and feel' of job</li> <li>• Low adverse impact Serves as a highly objective method of assessment</li> <li>• Easily adapted to an automated environment</li> <li>• Appropriate for all grade levels</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of hiring a poor performer is high</li> <li>• Smaller volume of applicants</li> <li>• Assessment of specific job-related tasks or activities is desirable</li> <li>• Use as a second-level screening tool or as a single screening tool</li> </ul>