



Guidance on the Use of Self-Reported Assessments

In alignment with the [Chance to Compete Act of 2024](#)¹, the [Merit Hiring Plan](#) directs agencies to phase out the use of self-assessments for rating and ranking and expand the use of technical and alternative assessments that measure job-related skills and competencies in the pre-certification process. This reform reduces reliance on self-reported credentials and strengthens the use of objective, validated evidence of job-relevant skills in Federal hiring.

Purpose

This guidance clarifies the appropriate use of self-assessments (e.g., occupational questionnaires) in competitive hiring in alignment with the Chance to Compete Act of 2024, 5 USC §3304, and the Merit Hiring Plan.

Scope

Agency Chief Human Capital Officers and Talent Teams are responsible for incorporating this guidance into agency hiring policies and ensuring that self-assessments are used only in the limited, permissible manner described below.

This guidance applies to competitive service (Delegated Examining – term or permanent), Merit Promotion – temporary or permanent, and internal Merit Promotion – temporary or permanent), excepted service under Title 5 (e.g., [Pathways Programs](#), [Schedule A](#), [VRA](#), etc.), Direct-Hire Authority, and hiring authorities that could lead to a competitive service appointment.

Agencies are required to implement this guidance in conjunction with their Merit Promotion Plans and other relevant policies. They must also ensure compliance with collective bargaining agreements, where applicable.

Policy

Agencies must not use self-assessments to rate or rank applicants for competitive hiring, merit promotion, and direct-hire authority, except as expressly authorized by the U.S. Office of Personnel Management (OPM) under the limited circumstances described below. The Merit Hiring Plan directed agencies to “phase out the use of self-assessments (e.g., occupational questionnaires) for rating or ranking” effective September 30, 2025.

¹ The Chance to Compete Act of 2024 was codified into law at [5 USC §3304](#).

Self-assessments (e.g., occupational questionnaires) generally ask applicants to self-report on their level of competence or proficiency in carrying out critical tasks and demonstrating critical competencies identified through job analysis.

Self-assessments (e.g., occupational questionnaires) may still be used for qualification and eligibility determinations, but not as a basis for ranking or rating candidates in the selection process. In place of self-assessments for rating and ranking, agencies must use validated technical and alternative assessments—such as USA Hire assessments, structured interviews, work samples, skills tests, structured resume reviews, or relevant assessments—that are grounded in job analysis and measure job-related competencies. These assessments must be incorporated into the pre-certification process, whether agencies are implementing a multi-assessment or multi-hurdle approach.

Example: Using an occupational questionnaire in a pass/fail manner to determine if applicants meet the minimum qualifications before administering a technical or alternative assessment. There are situations in which this may be a valuable approach (e.g., when the number of applicants for a position being filled is expected to be high, certification or licensure is a condition of eligibility, the subsequent assessment does not address minimum qualifications). Because occupational questionnaires lack the ability to distinguish a top performer from an average performer, OPM directs agencies that an occupational questionnaire is not to be used for rating and ranking.

Waiver Request Instructions

Any use of self-assessments for ranking beyond initial screening (outside of limited categories such as GS-01 through GS-04 or seasonal roles) requires approval from OPM. Agencies must submit a waiver request to Assessment_Information@opm.gov, with a documented explanation of the compelling need, including:

- 1) a description of the position(s) and hiring context
- 2) background information on the prior or current use of self-assessments for the position(s) for which the waiver is requested and
- 3) justification for continued use of self-assessments for rating and ranking, including why technical or alternative assessments are impracticable.

Waivers are expected to be rare and limited to circumstances in which no practicable technical or alternative assessment exists.

Implementation

Although OPM provides Government-wide leadership on Federal personnel policies and programs, each Federal agency has full authority and responsibility to administer and carry out their own hiring programs. This includes designing an assessment strategy and administering assessments which meet their needs. Generally, agencies do not need to get OPM approval to use a specific assessment.

OPM encourages agencies to consider the following best practices to strengthen the design and use of assessments:

- Conduct a rigorous job analysis (5 CFR 300.103) and involve Subject Matter Experts (SMEs). A thorough job analysis is essential to identify critical competencies and ensure validity. It is very important to use SME involvement to link assessment content to actual job requirements and improve predictive accuracy. Appendix D of the OPM [Delegated Examining Operations Handbook \(DEOH\)](#) provides one method for conducting a rigorous job analysis.
- Ensure alignment with assessment intent and competency requirements. Assessment content should reflect the knowledge, skills, and abilities necessary for successful job performance.
- Avoid binary yes/no questions. Instead, design items that measure proficiency levels or outcomes tied to specific competencies.
- Differentiate between self-report and self-rating. Agencies are required to reduce reliance on self-assessment questionnaires and incorporate more objective measures, such as structured interviews or SME resume reviews. If crediting plans are used, avoid evaluative words such as expert or extensive in questions and response options.
- Focus on quality of experience rather than quantity. When evaluating experience, consider the complexity and relevance of tasks performed, not just duration or level.
- Document the assessment strategy used for each hiring action, including the rationale for any use of self-reported assessments and the technical or alternative assessments used for rating and ranking.

Crediting Plan

Crediting plans may be used for merit promotion actions and non-competitive hiring and are consistent with the Merit Hiring Plan's emphasis on skills-based assessments, provided they are based on a job analysis, applied consistently, and comply with merit system principles and applicable OPM guidance.

A crediting plan, also known as a rating schedule, is a structured method for evaluating candidates' job-related competencies by reviewing objective information such as positions held, levels of responsibility, accomplishments, and relevant job-related education, as supported by the job analysis. Crediting plans may be used as an alternative to self-report questionnaires as part of a compliant skills-based assessment strategy. Under the MHP and applicable authorities, including 5 USC §3304, crediting plans may be used to verify qualifications and document relevant experience. However, OPM recommends that a technical or other valid assessment (e.g., structured interview or work-based assessment) also be used to demonstrate required skills.

Together, these assessment tools ensure that hiring decisions rely on observable, job-related performance rather than self-reporting alone which is no longer permissible. This blended model

allows agencies to maintain structured evaluation of applicant backgrounds while fully meeting the Act's and OPM's expectations for skills-based hiring.

Key Takeaways

- Self-reported assessments may not be used to rate or rank.
- At least one validated skills-based assessment is required.
- Crediting plans must be paired with compliant assessments.
- Waivers require OPM approval and compelling justification.

Resources

- [Competitive Service; examinations](#) (5 USC §3304)
- [OPM's Delegated Examining Operations Handbook](#)
- [Merit Hiring Plan Resources](#)
- [OPM's Assessment Decision Guide](#)
- [The Guide to Better Occupational Questionnaires](#)
- [Federal Hiring Assessment and Selection Outcome Dashboard](#)

Myth Busters

Myth #1: After self-reported questionnaires (e.g., occupational questionnaires) were phased out for rating and ranking, agencies can no longer accurately assess an applicant's qualifications during the early stages of the hiring process.

Fact: While agencies may not use self-reported questionnaires to rate or rank applicants (as part of the pre-certification assessment), they may still require other job-related materials and pre-certificate assessments at appropriate points in the hiring process, whether implementing a multi-assessment or multi-hurdle strategy. Written accomplishment records, writing samples, structured interviews, work samples, and other validated assessment tools may be used to evaluate an applicant's qualifications and competencies.

Myth #2: The only way to rank large numbers of eligible applicants quickly and efficiently is with a self-reported questionnaire.

Fact: Self-reported questionnaires were widely used due to the relative ease with which they can be developed, administered and scored. However, there are other assessments that can be used to rank large numbers of eligible applicants efficiently and effectively – for example, USA Hire Assessments.

Myth #3: The requirement to use technical assessments does not apply when filling positions in the excepted service.

Fact: It depends on whether the positions are in the excepted service under title 5 or another governing authority. If they are non-title 5 excepted service positions, then the use of technical assessments as outlined in the Merit Hiring Plan is not required but still strongly encouraged. If they are in the excepted service under title 5, then use of technical assessments is required.

Myth #4: Agencies that use only non-scored assessments are not required to meet the MHP requirement of including at least one technical assessment, nor do they need to apply the Rule of Many.

Fact: Agencies must include at least one technical assessment as a part of the hiring process. That assessment may generate either a numerical score or a descriptive proficiency level. Most assessments do or can result in a numeric score. For example, you can establish scoring for structured interviews, practical exercises, writing samples, etc. If you're using an assessment that doesn't result in scores, e.g., you use descriptive proficiency levels, you would use those levels to determine categories under category rating or determine the level that identifies best qualified under merit promotion. If your merit promotion plan dictates certifying the top 10, then you would have to use an assessment that resulted in a numeric score.

Rule of many is a numerical-based rating process. Therefore, to use rule of many procedures, your assessments would have to result in a numeric score.

Myth #5: Agencies can ask short essay type questions during the initial first hurdle as a way to assess applicant qualifications.

Fact: Agencies can request applicants to provide a short description of their technical skills or showcase their technical ability for the position at any point in the hiring process as long as the request is aligned with the job analysis and included in the job announcement. Agencies are not allowed to return to the practice of requiring applicants to provide written essays for each required qualification at the time of application. However, agency applications can be structured to ask up to three (and no more than three) candidate questions that may request up to one paragraph each of descriptive text (not to exceed 700 characters each) to illustrate a candidate's technical ability. In addition, agencies may ask a candidate to complete a very short task to showcase their skills, may ask for a writing sample, and may use a writing skills assessment (and are encouraged to use these types of assessments where job-appropriate). The [four short essay questions](#) are not considered an assessment and therefore, cannot be used as part of a hurdle or assessment.

Questions

Agency headquarters-level human resources offices may send questions and requests for waivers to OPM at Assessment_Information@opm.gov. Employees should contact their agency human resources offices for assistance. If you have any questions or need additional information about the Merit Hiring Plan, please contact HX@opm.gov.