


## Spotlight on: Qualifications Determination

#	Slide	Notes
1.1	 <p><b>Spotlight On: Qualifications Determinations</b></p> <p><b>OPM</b> U.S. Office of Personnel Management</p>	
1.3	<p><b>Objectives</b></p> <p>Upon completion of this activity, the student will be able to:</p> <ul style="list-style-type: none"><li>• identify proper sources of minimum qualification requirements for both General Schedule and Federal Wage System positions.</li><li>• explain and use selective factors.</li><li>• understand and apply quality ranking factors.</li><li>• distinguish among General Schedule qualification standards, including group standards and individual standards.</li><li>• properly apply General Schedule qualification standards including general experience, specialized experience, education requirements, and combination of education and experience.</li></ul> <p><b>OPM</b> U.S. Office of Personnel Management</p>	

## Qualifications Determinations



In reviewing applications to a job announcement, once you have determined which applicants meet the eligibility requirements (such as veterans' preference, career transition program eligibilities (CTAP/ICTAP), etc.), you can then review the applicants' qualifications.

Certain minimum requirements must be met before appointing an individual to a job using competitive examining procedures.

- They are typically expressed in terms of job-related experience or education (e.g., course credit hours) or a combination of the two.
  - They may also be expressed as proficiency levels on a competency-based assessment.

1.5

## Purpose of Qualifications Review

- The purpose of qualifications review is to identify those applicants who are likely to perform successfully on the job and to screen out those who are unlikely to do so.
- This is accomplished by applying the applicable qualification standard to establish the minimum qualifications for the position and to compare applicants' experience and/or education to the qualification standard to determine if they are qualified for the position.
- OPM-issued qualification standards are not designed to rank applicants, identify the best qualified candidates for particular positions, or otherwise substitute for a comprehensive assessment of job qualifications.
  - At this point, you are not determining which applicants are the "most qualified" – this will be done later when you assess and rate the qualified applicants.
  - Rather, you are determining *minimum qualifications*.

1.6

## Which Qualification Standard to Use?

- Minimum qualification requirements always include, but are not limited to, the qualification standards that OPM validates and sets for occupations in the Federal Government.
- There are two separate frameworks for Occupational Qualifications based on these two types of positions:
  - General Schedule (GS) positions
  - Federal Wage System (FWS) positions
- The type of position being recruited will determine which qualification standard must be applied.



1.7

## Minimum Qualification Requirements

- Qualification standards usually apply Governmentwide, but occasionally some are established as OPM-approved agency-specific standards.
- In addition to the qualification standards, minimum qualification requirements may also include attaining minimum proficiency levels on a competency-based assessment or other quality indicators deemed to constitute a passing grade.
- You may also include any selective factors you establish for the position through the job analysis process.
- These general occupational qualification standards and selective factors are discussed further in this module.

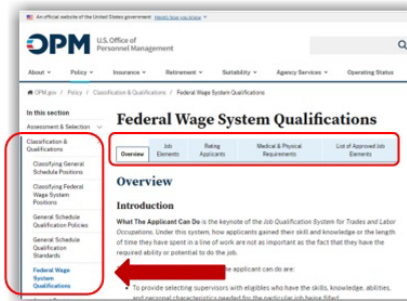
The qualification requirements you apply must have been clearly specified in the job opportunity announcement (JOA).

1.8

## Federal Wage System Positions

Federal Wage System positions (e.g., WG, WL, WS) utilize:

- Requirements in the Job Qualification System for Trades and Labor Occupational Handbook, also found in the **Federal Wage System Qualifications**
- Agency-developed requirements that retain the required screen-out elements and use the prescribed rating process and transmutation table



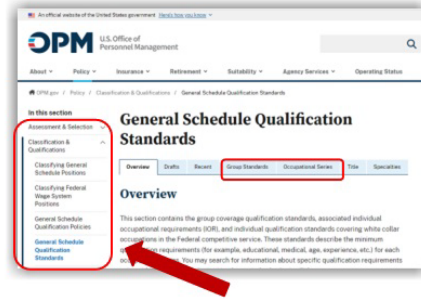
Federal Wage System positions are often referred to generally as "Wage Grade" positions, but the system encompasses WG (nonsupervisory jobs), WL (leader jobs), and WS (supervisory jobs).

1.9

## General Schedule (GS) Positions

General Schedule (GS) positions utilize:

- Requirements located in the **General Schedule Qualification Standards**
- Requirements established under a qualification pilot program; or
- Agency-specific standards that have been approved by OPM



1.10

## The Role of Minimum Qualification Requirements

- Minimum requirements are intended to reduce the processing of unqualified applicants by screening out those who are unlikely to succeed in the job.
- Screening for minimum qualifications is usually the first hurdle in the selection process. The first step is to sort applicants into two groups: ineligible and eligible. Applicants who do not meet the minimum qualification requirements are ineligible and thus "screened out."
- When the examining process uses category rating procedures, applicants meeting minimum requirements are eligible for assessment.
  - With appropriate subject matter and assessment expertise, your agency may consider establishing what would constitute a passing grade for the subsequent assessment in order to determine who may ultimately be placed in quality categories.
- Only those who pass both the initial minimum qualifications screen and the assessment phase are eligible for appointment.

Minimum qualifications screening and subsequent assessment are two separate steps in the examining process. You should be careful not to conflate these steps.

1.11

## When the Applicant Does Not Meet the Qualification Requirements

- An applicant who does not meet the qualification requirements will not receive further consideration for the position.
- If you determine that an applicant does not meet the qualification requirements for the position, you must notify the applicant of your determination.
- Examining decisions made by your office are subject to applicant appeal upon reasonable demonstration that a review is necessary.
- For more information about applicant notification procedures and the agency responsibility to reconsider, see Chapter 5 of the **Delegated Examining Operations Handbook** (DEOH).



1.12

## Knowledge Check 1

True or False?

Unless your agency has an established qualification pilot program or an OPM-approved agency-specific qualifications standard, your agency must use OPM qualifications requirements found in the *Operating Manual: Qualification Standards for General Schedule Positions* when examining for a General Schedule (GS) position.

**Check Your Answer**



**Complete the practice exercises in the Certification and Selection Workbook. Answers can be found in the Answer Guide.**

1.13

## Knowledge Check 2

Agencies can use the qualification requirements found in *the Operating Manual: Qualification Standards for General Schedule Positions* to fill Federal Wage System (FWS) positions.



Check Your Answer

**Complete the practice exercises in the Certification and Selection Workbook. Answers can be found in the Answer Guide.**

1.14

## Selective Factors

- In addition to the minimum qualification requirements, selective factors identify any qualifications that are essential for the job and are required when the person starts the job.
- **Definition:** A knowledge, skill, or ability (KSA), competency, or special qualification without which a candidate could not perform the duties of a position in a satisfactory manner.
  - Selective factors are applied in addition to minimum qualifications.
  - Applicants who do not meet a selective factor are ineligible for further consideration.

A selective factor must be identified within the job opportunity announcement and must be applied through the minimum qualifications review process.

1.15

## Characteristics of a Selective Factor

- Requires extensive training or experience to develop that could not be learned during the normal period of orientation on the job (e.g., foreign language);
- Is essential for successful performance on the job;
- Is almost always geared toward a specific technical competency/KSA; and
- Is not too restrictive that it would eliminate a potential applicant due to the use of experiences found only in the Federal Government or within an agency.



**Note:** In accordance with 5 U.S.C. 3308, it is prohibited to require education as a selective factor.



1.16

## Examples of a Selective Factor

- A commonly applied selective factor is a special language requirement.
  - Learning a language involves several years of training, and, for certain positions, a person cannot perform successfully unless he or she can communicate in a special language.
  - In addition, applicants cannot compensate for a lower language proficiency level with higher levels of proficiency on other competencies.
- Other examples may include certifications such as Firefighter I or Hazard Material Incident Commander, and licensure requirements such as commercial driver's license and state pesticide applicator license.
- You must be careful not to be too restrictive and you must never use knowledge or experience that could have been gained only while employed by the Federal Government as a selective factor.
  - For example, you may not require applicants to have knowledge of, or experience with, agency-specific systems, processes, or operations.



1.17

## Documenting Selective Factors

- Must be established through job analysis
- Documented by identifying:
  - Competencies/KSAs basic to and essential for satisfactory performance of the job
  - Duties or tasks performed by the employee that require the possession of the requested competencies/KSAs
  - Education, experience or other qualifications that provide evidence of the possession of the requested competencies/KSAs
- Agencies may use their own job analysis forms to document selective factors, or they may use the **SF 39A** form, which is designed by OPM to document selective factors and quality ranking factors.
- If you cannot document a selective factor as essential to the candidate's ability to perform the job, you can evaluate its use as a quality ranking factor.



1.18

## Quality Ranking Factors

- Quality ranking factors are competencies/ KSAs that are expected to enhance performance in a position significantly but are not essential for satisfactory performance.
- You may rank applicants with higher proficiency levels above those with lower proficiency levels based on a quality ranking factor, but you cannot rate an applicant ineligible solely for failure to possess a quality ranking factor.
  - Note: Floating rules still apply where applicable, so for all positions that are not scientific and professional at the GS-09 or higher, CPS/CP preference eligibles who do not possess the quality ranking factor will also float to the highest quality category.

### Documentation:

- Like selective factors, quality ranking factors must be identified and documented through the job analysis process.
- You must identify quality ranking factor(s) in the job opportunity announcement and clearly explain how it(they) will be used.

[Learn More](#)



## Quality Ranking Factors

- **With quality ranking factors, the focus is on the level of proficiency the applicant brings to the job. Applicants with higher proficiency levels should perform better on the job.**
- **Applicants who meet the minimum qualifications are rated on the quality ranking factor(s) and the other competencies/KSAs identified through job analysis to produce a rank (score) order or quality list of eligible candidates. Applicants who possess or demonstrate a high level of proficiency in the quality ranking factor may be ranked above those who do not possess it (or who demonstrate a low level of proficiency).**
- **With category rating, you will establish the scoring (or ranking) criteria so that only those who possess or demonstrate a high level of proficiency on the quality ranking factor will place into the highest quality category.** ❌

1.19

## Example of a Quality Ranking Factor

Skill in public speaking may be used as a quality ranking factor for a position in an organization where policy changes are communicated to the public in several ways and conducting open public forums is one of the major ways.

For this example, applicants who meet the minimum qualification requirements will be rated on the following competencies:

- Skill in public speaking (quality ranking factor)
- Technical competency
- Written communication
- Oral communication

While all of the above competencies/KSAs are being assessed to generate a rating or quality category placement, applicants who demonstrate skill in public speaking (through prior experience, for example) may be ranked above those who do not possess it.



1.20

## Knowledge Check 3

True or False?

A selective factor may require agency-specific knowledge.

**Check Your  
Answer**



**Complete the practice exercises in the Certification and Selection Workbook. Answers can be found in the Answer Guide.**

1.21

## GS Qualification Standards



Now we will explore more about the General Schedule qualification standards and how to apply them to determine minimum qualifications for General Schedule positions.

After completing this section, the student will be able to:

- distinguish among General Schedule qualification standards, including group standards and individual standards; and
- properly apply General Schedule qualification standards including general experience, specialized experience, education requirements, and combination of education and experience.

1.22

## GS Positions – Getting Specific with Qualification Requirements

- Because a published OPM qualification standard may cover hundreds of positions in dozens of organizations, it must be broad enough to cover the range of work classified to the occupational series.
- Therefore, examining offices must identify through a job analysis, and clearly describe in the job opportunity announcement, the specific experience or education required to qualify for the position(s) being announced.
  - All job postings must include specific qualifications based on the knowledge, skills, and abilities (KSAs)/competencies from a job analysis for each employment action (5 CFR 300.103).
- The specific minimum requirements may be demonstrated through passing a competency-based assessment in addition to meeting specific experience (i.e., general or specialized) and/or education requirements identified in the qualification standard.

## Specialized Experience



Select here to view OPM Definition of Specialized Experience.

When an agency, through job analysis, determines the specialized experience required for a position, they must make sure that their definition still conforms with this criteria defined by OPM.

\*Select each option below to see examples of agency-developed specialized experience individualized for the position.

IT Specialist (INFO SEC), GS-2210-15

Budget Analyst, GS-0560-9

Supply Technician, GS-2005-5

## Specialized Experience



### OPM definition of specialized experience:

- experience that has equipped the applicant with the particular knowledge, skills, and abilities/competencies to perform successfully the duties of the position and is typically in or related to the work of the position to be filled.



## Specialized Experience

### IT Specialist (INFO SEC), GS-2210-15

One year of specialized experience at the next lower grade level (GS-14), or equivalent, is required to qualify for this position.

**Specialized experience is defined as:** developing information security and privacy policy, and directives; designing enterprise-wide risk management strategies for a business/organizational cybersecurity environment; and leading project teams in the execution of internal and external IT security audits.



## Specialized Experience

### Budget Analyst, GS-0560-9



One year of specialized experience at the next lower grade level (GS-7), or equivalent, is required to qualify for this position. Specialized experience is experience that has equipped the applicant with the particular knowledge, skills, and abilities/competencies to perform successfully the duties of the position and is typically in or related to the work of the position to be filled.

For this position, **specialized experience is defined as:** (1) creating reports using an automated financial data system; (2) researching and tracking financial obligations; and (3) auditing financial records to reconcile discrepancies.



## Specialized Experience

### Supply Technician, GS-2005-5



One year of specialized experience at the next lower grade level (GS-4), or equivalent, is required to qualify for this position.

**Specialized experience is defined as:**

- a. receiving, scanning, and bar-coding supplies for a business, organization, or facility;
- b. using an automated system to maintain inventory; AND
- c. preparing or expediting supply requisitions.



1.24

## GS Positions – General Experience

- In contrast to specialized experience, general experience is required at grade levels (i.e., GS-2 to GS-4) where the knowledge and skills needed to perform the duties of a specific position are not a prerequisite, but where applicants must have demonstrated the ability to acquire the particular knowledge and skills.
- A proper job analysis is essential to identify the competencies/KSAs needed to successfully perform the work.
- The description of qualifying general experience will vary in its degree of specificity from one job series to another. For some occupational series, any progressively responsible work experience may be qualifying. Others may require experience that provided a familiarity with the subject matter or processes of the broad subject area of the occupational series. For example, an entry level medical technician position may require general experience that provided a basic knowledge of the procedures and equipment in a chemical or clinical laboratory.



1.25

## OPM Definitions of General Experience

### Clerical and Administrative Support Positions

*General Experience* (All positions except Reporting Stenographer, Shorthand Reporter, and Closed Micro-phone Reporter)-- Progressively responsible clerical, office, or other work that indicates ability to acquire the particular knowledge and skills needed to perform the duties of the position to be filled.

### Administrative and Management Positions

*General Experience*: For positions for which individual occupational requirements do not specify otherwise, general experience is 3 years of progressively responsible experience, 1 year of which was equivalent to at least GS-4, that demonstrates the ability to:

1. Analyze problems to identify significant factors, gather pertinent data, and recognize solutions;
2. Plan and organize work; and
3. Communicate effectively orally and in writing.

### Technical and Medical Support Positions

*General Experience*: (1) Any type of work that demonstrates the applicant's ability to perform the work of the position, or (2) experience that provided a familiarity with the subject matter or processes of the broad subject area of the occupation.

### Individual Occupational Requirements (example: Import Compliance series 1889)

**General Experience (for GS-5 positions):**  
Experience that demonstrated the ability to:

- Communicate effectively orally and in writing; and
- Deal effectively with others in person-to-person situations.



1.26

## Calculating Part Time Experience

In the GS qualification standards, the length of experience requirements are expressed in terms of full-time work. In most occupations, the normal full-time work week is 35-40 hours, and the normal work year is 12 months.

Part-time work is prorated in crediting experience. Part-time work below 35 hours a week is prorated by taking the part-time hours per week and dividing it by 40 hours to calculate its proportion of a full-time week, and then multiplying that by the weeks, months, or years of conducting the work to determine the equivalent full-time weeks, months, or years.

For example, an employee working 20 hours per week for a 12-month period should be credited with 6 months of experience.

- $20 \text{ hours} / 40 \text{ hours} = 0.5$
- $0.5 \times 12 \text{ months} = 6 \text{ months of full-time work experience}$

For more information on crediting work experience in other specific situations such as military experience, teaching experience, work study, concurrent employment and more, refer to the **General Schedule Operating Manual** and navigate to Section 3. Experience Requirements.



1.27

## Qualifying Education

When using the GS qualification standards for positions with minimum education requirements, only education from institutions that are accredited or preaccredited/candidate for accreditation may be used to meet those requirements, with limited exceptions (explored on the next slide).

OPM also recognizes generally accepted professional credentials, such as engineering registration, successful completion of certain actuarial examinations, or a Certified Public Accountant certificate as being equivalent to meeting minimum educational requirements. Examples of such alternate provisions are generally included in the qualification standard for the occupational series.



\*Select the image, for a Dept. of Education searchable database that can be used to identify list of school accreditations.



[Link to: Department of Education searchable database](#)

1.28

## Reviewing Education

When reviewing education documents for qualifications determinations, your agency policy and job opportunity announcement should describe what types of education documents are acceptable at the time of application and what will be required prior to appointment.

While your agency may accept a range of documentation to tentatively support an applicant qualifying based on education, prior to appointment you must verify the education with acceptable documentation for the official record, which includes:

- An official transcript;
- Statement from the institution's registrar, dean, or other appropriate officials; or
- Equivalent documentation.

1.29

## Academic Years & Credit Hours

OPM provides that an academic year is computed as follows (when that information cannot be obtained from the school):

- Undergraduate: 1 year = 30 semester hours (or 45 quarter hours)
- Graduate: 1 year = 18 semester hours (or 27 quarter hours)
- Business or Technical school: 1 year = 36 weeks of study (20+ hours per week)
- Conversion of quarter hours to semester hours is calculated as: (quarter hours) x (2/3) = semester hours

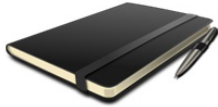
Refer to the [General Schedule Operating Manual](#) and navigate to Section 4. Educational and Training Provisions or Requirements for more information.

1.30

## Reviewing Foreign Education

When using the GS qualification standards, foreign education must be determined to be equivalent to an accredited U.S. education program.

- Applicants with foreign education must submit a foreign credential evaluation that determines what amount of U.S. education the foreign education equates to. Several services exist that are conducted by non-government private companies.
- Possession of a valid and current U.S. professional license by a graduate of a foreign professional school or program is also sufficient proof that the foreign education has been determined to be equivalent to the requisite U.S. professional education in that occupational field.



For further information on the acceptability of higher education for meeting minimum qualification requirements (including foreign education), select the image above and navigate to Section 4. Educational and Training Provisions or Requirements.



For more information about the evaluation of foreign education, select the image above.

Link to: [General Schedule Qualification Policies, Section 4. Educational and Training Provisions or Requirements](#)

Link to: [U.S. Department of Education, International Affairs page for foreign education](#)

1.31

## Knowledge Check 4

An applicant has 16 months of qualifying work experience. The work was conducted part-time for 25 hours per week.

Calculate the amount of full-time work this applicant's part-time work is equivalent to.

[View Answer](#)



**Complete the practice exercises in the Certification and Selection Workbook. Answers can be found in the Answer Guide.**

1.32

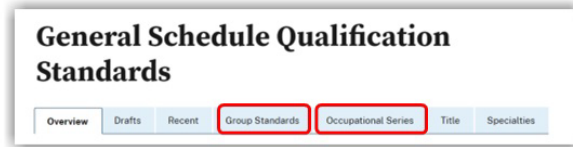
## OPM GS Qualification Standards

Two categories of General Schedule qualification standards are published by OPM:

- Group Standards
- Series-Specific Occupational Standards

We always use both standards when designing the minimum qualification requirements to advertise on the job opportunity announcement and to make qualifications determinations on applicants.

Located in the [General Schedule Qualification Standards](#), the group standards and series-specific occupational standards can be accessed using the tabs near the top of the web page.



1.33

## Group Standards Applicable to DE

- Contains common patterns of creditable experience and education to be used in making qualifications determinations.
- Each group standard includes a chart summarizing the experience or education required to qualify at a particular grade level followed by additional explanations.
- The groups are:
  - Professional and Scientific Positions
  - Administrative and Management Positions
  - Technical and Medical Support Positions
  - Clerical and Administrative Support Positions
  - Competitive Service Student Trainee Positions
    - This group standard only involves qualifying by required education and will not be explored in this module. For more information, please refer to the group standards.



1.34

## Group Standards Example

- Education, or
- Experience

Note: combination of education and experience is qualifying at grades for which both are accepted

### Administrative and Management Positions

This qualification standard covers positions in the General Schedule that involve the performance of two-grade interval administrative and management work. It contains common patterns of creditable experience and education to be used in making qualifications determinations.

A list of the occupational series covered by this standard is provided below.

This standard may also be used for two-grade interval positions other than those listed if the education and experience pattern is determined to be appropriate.

#### Education and experience requirements

The following table shows the amounts of education and/or experience required to qualify for positions covered by this standard.

GRADE	EDUCATION	EXPERIENCE	
		GENERAL	SPECIALIZED
GS-5	4-year course of study leading to a bachelor's degree	3 years, 1 year of which was equivalent to at least GS-4	None
GS-7	1 full year of graduate level education or superior academic achievement	None	1 year equivalent to at least GS-5
GS-9	master's or equivalent graduate degree or 2 full years of progressively higher level graduate education leading to such a degree or LL.E. or J.D., if related	None	1 year equivalent to at least GS-7
GS-11	Ph.D. or equivalent doctoral degree or 3 full years of progressively higher level graduate education leading to such a degree or LL.M., if related	None	1 year equivalent to at least GS-9
GS-12 and above	None	None	1 year equivalent to at least next lower grade level

NOTE: Equivalent combinations of education and experience are qualifying for all grade levels for which both education and experience are acceptable.



1.35

## Superior Academic Achievement (S.A.A.)

- GS-7 positions in the Administrative and Management Positions group and in the Professional and Scientific Positions group also include an option to qualify by superior academic achievement (S.A.A.).
- S.A.A. can involve qualifying based on class standing, grade-point average (GPA), or honor society membership.
- For more detailed guidance on S.A.A., refer to the superior academic achievement heading, shown on the right, under section 4. Educational and Training Provisions or Requirements in the **General Schedule Operating Manual**.

f. Superior academic achievement (S.A.A.) -- This provision covers advanced trainee positions that provide opportunities for advancement upon attaining required job skills and knowledge, require no prior experience, and have work classified at two-grade intervals. It recognizes students who have achieved superior academic standing as evidenced by one of the three methods described below. In order to be creditable under this provision, superior academic achievement must have been gained in a curriculum that is qualifying for the position to be filled.

The superior academic achievement provision applies to both initial appointment and inservice placement actions. It is to be used to determine eligibility for applicable GS-7 level positions of persons who have completed (or expect to complete within 9 months) all the requirements for a bachelor's degree from an accredited college or university.

Senior students can apply for positions prior to graduation and be considered for a GS-7 appointment based on their grades at the time of application. However, some applicants may not receive their final grades in a timely fashion after graduation. Therefore, agencies can either:

1. Require that senior students provide evidence that they maintained the required grades during their senior year prior to entry on duty; or
2. Appoint applicants based on their claimed academic achievement, pending verification of final grades. Agencies should inform such applicants that if the required grades were not maintained through their senior year, there is a possibility that they may not be able to retain either the GS-7 grade or the position.

S.A.A. is based on (1) class standing, (2) grade-point average, or (3) honor society membership.

1. Class standing -- Applicants must be in the upper third of the graduating class



1.36

## Group Standards Example cont.

A list of all occupational series that are covered by the group standard is provided at the end of each group standard.

Here we see part of the list for the Clerical and Administrative Support Positions group standard.

### Occupational Coverage

A list of the occupational series covered by this qualification standard is provided below. The occupational series marked with an asterisk have individual occupational requirements.

- |   |   |
|---|---|
| <a href="#">GS-029 Environmental Protection Assistant</a>             | <a href="#">GS-544 Civilian Pay</a>                               |
| <a href="#">GS-072 Fingerprint Identification</a>                     | <a href="#">GS-545 Military Pay</a>                               |
| <a href="#">GS-086 Security Clerical and Assistance</a>               | <a href="#">GS-561 Budget Clerical and Technician</a>             |
| <a href="#">GS-134 Intelligence Aid and Clerk</a>                     | <a href="#">GS-592 Tax Examining</a>                              |
| <a href="#">GS-203 Human Resources Assistance</a>                     | <a href="#">GS-593 Insurance Accounts</a>                         |
| <a href="#">GS-302 Messenger*</a>                                     | <a href="#">GS-675 Medical Records Technician</a>                 |
| <a href="#">GS-303 Miscellaneous Clerk and Assistant</a>              | <a href="#">GS-679 Medical Support Assistance</a>                 |
| <a href="#">GS-304 Information Receptionist</a>                       | <a href="#">GS-962 Contact Representative</a>                     |
| <a href="#">GS-305 Mail and File</a>                                  | <a href="#">GS-963 Legal Instruments Examining</a>                |
| <a href="#">GS-309 Correspondence Clerk</a>                           | <a href="#">GS-986 Legal Assistance</a>                           |
| <a href="#">GS-312 Clerk-Stenographer and Reporter</a>                | <a href="#">GS-998 Claims Assistance and Examining</a>            |
| <a href="#">GS-318 Secretary</a>                                      | <a href="#">GS-1001 General Arts and Information</a>              |
| <a href="#">GS-319 Closed Microphone Reporting</a>                    | <a href="#">GS-1046 Language Clerical*</a>                        |
| <a href="#">GS-322 Clerk-Typist</a>                                   | <a href="#">GS-1087 Editorial Assistance</a>                      |
| <a href="#">GS-326 Office Automation Clerical and Assistance</a>      | <a href="#">GS-1101 General Business and Industry</a>             |
| <a href="#">GS-332 Computer Operation</a>                             | <a href="#">GS-1105 Purchasing</a>                                |
| <a href="#">GS-335 Computer Clerk and Assistant</a>                   | <a href="#">GS-1106 Procurement Clerical and Technician</a>       |
| <a href="#">GS-344 Management and Program Clerical and Assistance</a> | <a href="#">GS-1107 Property Disposal Clerical and Technician</a> |
| <a href="#">GS-350 Equipment Operator</a>                             | <a href="#">GS-1152 Production Control</a>                        |
| <a href="#">GS-351 Printing Clerical</a>                              | <a href="#">GS-1411 Library Technician</a>                        |
| <a href="#">GS-356 Data Transcriber</a>                               | <a href="#">GS-1421 Archives Technician</a>                       |
| <a href="#">GS-357 Coding</a>   | <a href="#">GS-1531 Statistical Assistant</a>                     |



1.37

## OPM GS Series-Specific Occupational Standards

The OPM GS series-specific occupational standards detail, for each job series, any Individual Occupational Requirements, which are specific experience and/or education requirements for that job. For example, some positions have a basic education requirement where all applicants must possess a degree or a certain amount of credit hours in a subject field. However, many positions do not have individual requirements. The examples to the right show both types of standards.

The series-specific occupational standards also provide a link to the applicable group standard that the job series falls under, when one is available, as shown in both of the examples to the right. Be aware that some positions do not link to a group standard and only the series-specific occupational standard is used.

### Loan Specialist Series 1165

**Individual Occupational Requirements**

**Education**  
 undergraduate and graduate Education Major study - finance, economics, accounting, insurance, engineering, mathematics, public relations, statistics, or other fields related to the field; agricultural, economics, farm, livestock or ranch-management

**Experience**  
 General Experience for GS-11 positions: Experience that includes and processing the information or conclusions or that provided a knowledge of the principles of financial or contract property, the results, or their measurement.  
 Specialized Experience for positions above GS-11: Experience agricultural, commercial, realty, or other types of loans. Each such work as reviewing and passing upon applications for mortgage loans; serving as a member of a bank or other financial analysis of commercial concerns for investment purposes; appraising real estate to determine property valuation or similar work.

**Related Information**  
**Associated Group Standard**  
 Use the [Group Coverage Qualification Standard for Administration and Management Positions](#) for this series in conjunction with the Individual Occupational Requirements described below.

### Contact Representative Series 0962

**Individual Occupational Requirements**  
 There are no Individual Occupational Requirements for this series.

**Related Information**  
**Associated Group Standard**  
 Use the [Group Coverage Qualification Standard for Clerical and Administrative Support Positions](#) for this series in conjunction with the Individual Occupational Requirements described below.



1.38

## Series-Specific Occupational Standards, Part 1

The series-specific occupational standards are listed by occupational group, which is a grouping of positions based upon job family and represented by the similar numbering of the job series (ex: Engineering and Architecture positions in the 0800 - 0899 occupational series; or Accounting and Budget positions in the 0500 - 0599 occupational series).

Select the occupational series link (or scroll down the page) to be directed to the listing of individual job series in that occupational series grouping.



The screenshot shows the OPM website's 'General Schedule Qualification Standards' page. The 'Occupational Series' tab is selected and highlighted with a red box. Below it, a list of occupational series is shown, with '0500-0599: Accounting and Budget' highlighted in blue and pointed to by a red arrow.

1.39

## Series-Specific Occupational Standards, Part 2

Select the Position Title link for the occupational series to find its series-specific occupational standards.



Occupational Series - 0500 - 0599 - Accounting and Budget

Series	Position Title	Min. Ed.	License or Certificate	Test Requirement	Medical Requirement
0501	<a href="#">Financial Administration and Program Series</a>			GS-5/7	
0503	Financial Clerical and Assistance Program Series				
0505	Financial Management Series				
0510	Accounting Series	X			
0511	Auditing Series	X			
0512	Internal Revenue Agent Series	X			
0525	Accounting Technician Series				
0526	Tax Specialist Series			GS-5/7	
0530	Cash Processing Series				
0540	Voucher				

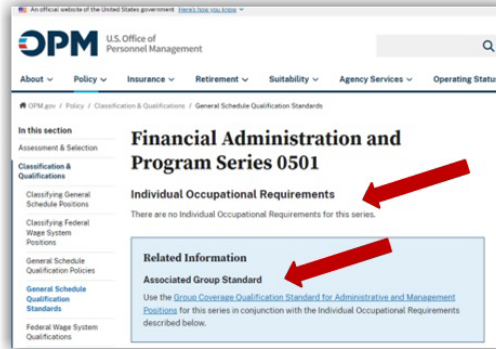
A red arrow points to the 'Financial Administration and Program Series' link in the first row of the table.

1.40

## Series-Specific Occupational Standards without Individual Occupation Requirements

Many occupations do not have Individual Occupational Requirements.

In this situation, use the associated group standard provided.

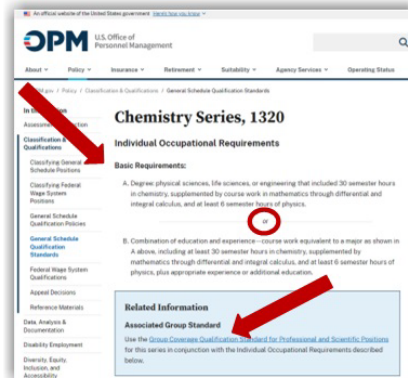


1.41

## Series-Specific Occupational Standards with Individual Occupation Requirements

Some occupations have Individual Occupational Requirements (IOR), which may include basic requirements, in addition to the Group Standard.

In this situation, use both the IOR and the Group Standard in conjunction with one another.

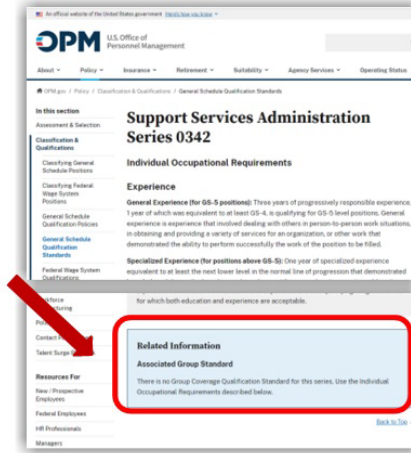


1.42

## Series-Specific Occupational Standards Not Covered by a Group Standard

Some occupations have Individual Occupational Requirements (IOR), which may include basic requirements, but are not part of a group standard.

In this situation, use the IOR as described to design minimum requirements and conduct qualifications determinations.



1.43


## Combination of Education & Experience

For each group standard:

- Education and experience may be combined for all grade levels for which both education and experience are acceptable.
- Always review each group standard to see how the combination of education and experience needs to be calculated.
  - Each group standard has different combination rules, varying for the different grade levels.



Please take a few moments to review the combination rules for each group standard presented on the next few pages.

<p>1.44</p>	<p><b>Combination of Education &amp; Experience – Clerical &amp; Admin Support</b></p> <p>Clerical and Administrative Support Positions</p> <ul style="list-style-type: none"> <li>• GS-3 and GS-4: <ul style="list-style-type: none"> <li>• First determine the applicant's total qualifying experience as a percentage of the experience required for the grade level; then determine the applicant's education as a percentage of the education required for the grade level; then add the two percentages. The total percentage must equal at least 100 percent to qualify an applicant for that grade level.</li> </ul> </li> <li>• GS-5 (except Clerk-Stenographer, which does not require specialized experience): <ul style="list-style-type: none"> <li>• Only education in excess of the first 60 semester hours (i.e., beyond the second year) is creditable toward meeting the specialized experience requirement. One full academic year of study (30 semester hours) beyond the second year is equivalent to 6 months of specialized experience.</li> </ul> </li> </ul> 	
<p>1.45</p>	<p><b>Combination of Education &amp; Experience – Technical &amp; Medical Support</b></p> <p>Technical and Medical Support Positions</p> <ul style="list-style-type: none"> <li>• If education is used to meet specialized experience requirements, then such education must include courses directly related to the work of the position. (When crediting education, prorate the number of hours of related courses required as a proportion of the total education to be used.)</li> <li>• GS-3: <ul style="list-style-type: none"> <li>• First determine the applicant's total qualifying experience as a percentage of the 6 months' experience required for GS-3; then determine the applicant's education as a percentage of the 1 year of education that meets the requirements for GS-3. Add the two percentages. The total percentage must equal at least 100 percent to qualify an applicant for GS-3.</li> </ul> </li> <li>• GS-4: <ul style="list-style-type: none"> <li>• First determine the applicant's total qualifying experience as a percentage of the 1 year of experience required for GS-4; then determine the applicant's education as a percentage of the 2 years of education that meets the requirements for GS-4. Add the two percentages. The total percentage must equal at least 100 percent to qualify an applicant for GS-4.</li> </ul> </li> <li>• GS-5: <ul style="list-style-type: none"> <li>• Only education in excess of the first 60 semester hours of a course of study leading to a bachelor's degree is creditable toward meeting the specialized experience requirements. Two full academic years of study, or 60 semester hours, beyond the second year is equivalent to 1 year of specialized experience. Determine the applicant's total qualifying experience as a percentage of the year of specialized experience required at the GS-5 level. Then determine the applicant's education as a percentage of the education that meets the requirements for GS-5. Add the two percentages. The total percentage must equal at least 100 percent to qualify an applicant for GS-5.</li> </ul> </li> </ul>	

1.46

## Combination of Education & Experience - Administrative & Managerial

### Administrative and Managerial Positions

- GS-5 and GS-7:
  - First determine the applicant's total qualifying experience as a percentage of the experience required for the grade level; then determine the applicant's education as a percentage of the education required for the grade level; and then add the two percentages. The total percentages must equal at least 100 percent to qualify an applicant for that grade level.
- GS-9 and GS-11:
  - Use the same process as described above, but for the education portion only graduate education in excess of the amount required for the next lower grade level may be used to qualify applicants for positions at grades GS-9 and GS-11.
    - (When crediting education that requires specific course work, prorate the number of hours of related courses required as a proportion of the total education to be used.)



1.47

## Combination of Education & Experience – Professional & Scientific

### Professional and Scientific Positions

- GS-7:
  - First determine the applicant's total qualifying experience as a percentage of the experience required for the grade level; then determine the applicant's education as a percentage of the education required for the grade level; and then add the two percentages. The total percentages must equal at least 100 percent to qualify an applicant for that grade level.
- GS-9 and GS-11 (and GS-12 research positions):
  - Use the same process as described above, but for the education portion only graduate education in excess of the amount required for the next lower grade level may be combined with experience.



1.48

## Combination of Education & Experience – Graduate Education with GS-9 & GS-11\*

Only graduate education in excess of the amount required for the next lower grade level may be used to qualify applicants for positions at grades GS-9 and GS-11\*

- Only applicable in the Administrative and Management Positions group, and the Professional and Scientific Positions group

\*Also includes GS-12 research positions in the Professional and Scientific Positions group

### Administrative and Management Positions

Combining Education and Experience: Combinations of successfully completed post-high school education and experience may be used to meet total qualification requirements for the grade levels specified in the table, and may be computed by first determining the applicant's total qualifying experience as a percentage of the experience required for the grade level; then determining the applicant's education as a percentage of the education required for the grade level; and then adding the two percentages. The total percentages must equal at least 100 percent to qualify an applicant for that grade level. Only graduate education in excess of the amount required for the next lower grade level may be used to qualify applicants for positions at grades GS-9 and GS-11. (When crediting education that requires specific course work, prorate the number of hours of related courses required as a proportion of the total education to be used.)

### Professional and Scientific Positions

Combination of Graduate Education and Professional Experience: Combinations of successfully completed graduate level education and specialized experience may be used to meet total experience requirements. Only graduate level education in excess of the amount required for the next lower grade level may be combined with experience. For example, an applicant with 6 months of appropriate experience equivalent to GS-7 (50 percent of the experience requirement for GS-9) and 27 semester hours of appropriate graduate education (50 percent of the education requirement for GS-9, in excess of that required for GS-7) would be qualified for a GS-9 position (assuming that there is no evidence that the attended college or university requires more than 18 semester hours as equivalent to a year of graduate study).



1.49

## Example 1: Combination of Education & Experience

An applicant applies for a GS-9 *management* position (uses the Administrative and Managerial Positions group standard). The applicant's resume and application verify the following:

- 20 semester hours of job-related graduate level education in a master's degree program
- 8 months of qualifying GS-7 level equivalent specialized experience

Is the applicant qualified at the GS-9? Use your online resources and calculate the answer.

[View Answer](#)



## Example 1: Combination of Education & Experience

Experience:

- Requirement is one year (12 months) of specialized experience
- $8 \text{ months} / 12 \text{ months} = 0.67 = 67\%$

Education:

- Requirement is 2 years of graduate education (36 semester hours) leading to a master's degree or equivalent.
- For the GS-9 in the Administrative and Managerial Positions group standard, only graduate education in excess of the GS-7 requirement (1 year or 18 semester hours) may be used toward the combination.
- Applicant's education in excess of GS-7:
  - $20 \text{ semester hours} - 18 \text{ semester hours} = 2 \text{ semester hours}$ .
- How much of the creditable education (i.e., that in excess of the first year of graduate education) has been completed towards meeting the final year of graduate education necessary to qualify at the GS-9? Remember, one year of graduate education is normally considered 18 semester hours.
  - $2 \text{ semester hours} / 18 \text{ semester hours} = 0.11 = 11\%$

**Answer:** Experience + Education = 67% + 11% = 78%. Education and experience total less than 100%, so the applicant is **NOT QUALIFIED**.



1.50

### Example 2: Combination of Education & Experience

An applicant applies for a GS-4 *clerical* position (in the Clerical and Administrative Support Positions group standard). The applicant's resume and application verify the following:

- 40 semester hours of undergraduate level education
- 9 months of qualifying general experience

Is the applicant qualified at the GS-4? Use your online resources and calculate the answer.

[View Answer](#)



### Example 2: Combination of Education & Experience

Experience:

- Requirement is one year (12 months) of general experience
- $9 \text{ months} / 12 \text{ months} = 0.75 = 75\%$

Education:

- Requirement is 2 years above high school = 60 semester hours
- $40 \text{ semester hours} / 60 \text{ semester hours} = 0.67 = 67\%$

**Answer:** Experience + Education =  $75\% + 67\% = 142\%$ . Education and experience total more than 100%, so the applicant is **QUALIFIED**. ❌

1.51

### Example 3: Combination of Education & Experience

An applicant applies for a GS-5 medical support position (in the Technical and Medical Support Positions group standard). The applicant's resume and application verify the following:

- 84 semester hours of undergraduate level education related to the occupation
- 6 months of qualifying specialized experience

Is the applicant qualified at the GS-5? Use your online resources and calculate the answer.

[View Answer](#)



### Example 3: Combination of Education & Experience

Experience:

- Requirement is one year (12 months) of specialized experience
- $6 \text{ months} / 12 \text{ months} = 0.50 = 50\%$

Education:

- Requirement is a 4-year course of study above high school leading to a bachelor's degree with courses related to the occupation.
- For the GS-5 in the Technical and Medical Support, **only** education in excess of the first 60 semester hours of a course of study leading to a bachelor's degree is creditable toward meeting the specialized experience requirements.
- Applicant's education beyond the second year:
  - $84 \text{ semester hours} - 60 \text{ semester hours} = 24 \text{ semester hours}$
- How much of the creditable education (i.e., that in excess of the first 60 semester hours of a course of study leading to a bachelor's degree) has been completed towards meeting the final two years of education necessary to qualify at the GS-5? Remember, one year of education beyond high school is normally considered 30 semester hours.
  - $24 \text{ semester hours} / 60 \text{ semester hours} = 0.40 = 40\%$

**Answer:** Experience + Education =  $50\% + 40\% = 90\%$ . Education and experience total less than 100%, so the applicant is **NOT QUALIFIED**. ❌

1.52



The last section contains exercises and questions to help you apply the knowledge you have learned about qualifications determinations.

**Complete the practice exercises in the Certification and Selection Workbook. Answers can be found in the Answer Guide.**