How to Use the Hiring Matrix Tool

PeopleAdmin User Guide

The purpose of this guide is to provide instructions on designing and utilizing the hiring matrix tool during the search process.

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Hiring Matrix

The hiring matrix tool is **required** for all faculty searches. This tool ensures the hiring selection decisions are made only on lawful, job-related, and non-discriminatory criteria, thus providing Equal Employment Opportunity to all applicants. The search committee should design the matrix categories to correspond to the required and preferred qualifications stipulated in the posting.

Sample hiring matrix templates can be found in the Faculty Recruitment Toolbox located under the Search Committee Resources – Hiring Matrix Tool.

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Step 1. After downloading the template, begin filling out the hiring matrix by entering the job title and job number at the top of the matrix. The posting number is assigned once the search is approved by Faculty and Academic Resources in the online recruitment system.

Posting Information

Position Title	Professor in Mechanical Engineering
Job Posting Number	202116FAC
Job Location	San Marcos
Department	Ingram School of Engineering

Job Title: Professor in Mechanical Engineering

Job Number: 202116FAC

	Verified	lifications	Required Qualifications (A "0" or "No" here eliminates applicant from further consideration)										

Step 2. Use the blank column headers to list the required qualifications and preferred qualifications. The qualifications should match the job posting exactly. Do not add criteria that does not appear in the posting or leave any qualification(s) out.

Required Qualifications	
Required Qualifications	• An earned doctorate in mechanical engineering or a closely related discipline. • Meet the relevant requirements of ISoE, College of Science and Engineering, the University and the TSUS Board of Regents to be tenured at the rank of professor. • Demonstrated experience in undergraduate and/or graduate curriculum development and ABET accreditation. • Demonstrated commitment to diversity.
Preferred Qualifications	• Demonstrated record of discipline specific research publications in internationally recognized journals and conferences. • Demonstrated experience in securing externally funded grants and contracts. • Evidence of excellence in teaching at the undergraduate level. • Industry experience and/or Professional Engineering licensure. • Demonstrated experience with one or more of the following digital tools/technologies: internet of things, big data and analytics, engineering simulation, additive manufacturing, robotics, artificial intelligence and/or cybersecurity.

Required Qualifications (A "0" or "No" here eliminates applicant from				Preferred Qualifications		
An earned doctorate in mechanical engineering or a closely related discipline.	Required Qualification #2	Required Qualification #3	Required Qualification #4	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences	Preferred Qualications #2	Preferred Qualications #3
1	1	1	1	1	1	1

Step 3. Below the qualifications, indicate the scoring range for each qualification [yes(1) /no(0), 1-5, 1-10, etc.]

Job Title: Professor in Mechanical Engineering										
Job Number: 202116FAC										
			Required Qualifications (A "0" or "No" here eliminates applicant from			**Preferred Qualifications**				
	Veteran's Preference Verified	Meets Required Qualifications	An earned doctorate in mechanical engineering or a closely related discipline.	Required Qualification #2	Required Qualification #3	Required Qualification #4	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences	Preferred Qualifications #2	Preferred Qualifications #3	P4	P5
Applicants Name	Y/N	Y/N	Yes/No or 0-X	Yes/No or 0-X	Yes/No or 0-X	Yes/No or 0-X	0-X	0-X	0-X	0-X	0-X

Step 4. Enter the names of all applicants, even those who have withdrawn or submitted incomplete applications. You are not required to evaluate these applicants; however, you need to indicate on the matrix why they were not scored. You can do this in the 'Notes' column on the far right of the matrix (e.g., withdrawn or incomplete application).

No.	Applicants Name	Veteran's Preference Verified Y/N	Meets Required Qualifications Y/N	An earned doctorate in mechanical engineering or a closely related discipline. Yes/No	Meet the relevant requirements to be tenured at the rank of professor Yes/No	R3 0-10	R4 0-5	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences 0-15	P2 0-5	P3 0-10	P4 0-15	P5 0-5	Total Application Screening Score	Veteran Interviewed Y/N	Preliminary Interview Score 20	Interview Score 20	Total Application Screening Score	Notes:
1	Lyndi Wittekiend	N	N										0				0	Withdrawn
2	Beth Koen	Y	Y	Yes	Yes	5.00	5.00	5.00	5.00	5.00	5.00	5.00	35	YES	5		40	Preliminary Interview Conducted - Determined un
3	Candice Satchell	N	Y	Yes	Yes	5.00	5.00	10.00	5.00	10.00	15.00	5.00	55		10		65	**Alternate #1 - Recommended for Interview**
4	Cindy Waggoner	N	Y	Yes	Yes	10.00	5.00	15.00	5.00	10.00	15.00	5.00	65		20		85	**Recommended for Interview**
5	Elizabeth Mello	N	N	Yes	No								0				0	Does not meet required qualificaiton - Tenured at t
6	Tammy Sharp	Y	N	No									0				0	Does not meet required qualificaiton - Education/
7	Nicholas Schellman	N	N										0				0	**Incomplete Application**

Step 5. Applicants must be screened based on the application materials provided as part of their application.

Application Procedures	The following documentation must be included in the application.
	1) Cover letter
	2) Curriculum vitae
	a) Professional registration status
	b) List of professional and post-doctoral employments
	c) List of published peer-reviewed articles
	d) List of funded research proposals, with funding amount and funding agency
	e) List of courses taught as the Instructor of Record
	3) Statements of research interests
	4) Statements of teaching interests
	5) List of three references

Step 6. When scoring applicants on the matrix, each column should indicate whether the applicant meets the specified qualification.

No.	Applicants Name	Veteran's Preference Verified Y/N	Meets Required Qualifications Y/N	An earned doctorate in mechanical engineering or a closely related discipline. Yes/No	Meet the relevant requirements to be tenured at the rank of professor Yes/No	R3 0-10	R4 0-5	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences 0-15	P2 0-5	P3 0-10	P4 0-15	P5 0-5	Total Application Screening Score	Veteran Interviewed Y/N	Preliminary Interview Score 20	Interview Score 20	Total Application Screening Score	Notes:
1	Lyndi Wittekiend	N	N										0				0	Withdrawn
2	Beth Koen	Y	Y	Yes	Yes	5.00	5.00	5.00	5.00	5.00	5.00	5.00	35	YES	5		40	Preliminary Interview Conducted - Determined un
3	Candice Satchell	N	Y	Yes	Yes	5.00	5.00	10.00	5.00	10.00	15.00	5.00	55		10		65	Alternate #1 - Recommended for Interview
4	Cindy Waggoner	N	Y	Yes	Yes	10.00	5.00	15.00	5.00	10.00	15.00	5.00	65		20		85	Recommended for Interview
5	Elizabeth Mello	N	N	Yes	No								0				0	Does not meet required qualificaiton - Tenured at t
6	Tammy Sharp	Y	N	No									0				0	Does not meet required qualificaiton - Education/
7	Nicholas Schellman	N	N										0				0	Incomplete Application

- If the applicant meets the qualification, indicate YES or a score within the scoring range [1-5, 1-10, etc.]
- If the applicant does not meet the qualification, indicate NO or zero [0].
  - Once you reach a required qualification that is not met, you may stop scoring the applicant.
  - For applicants who are missing at least one required qualification, mark them with an 'N' in the "Does Not Meet Required Qualifications" column.

No.	Applicants Name	Veteran's Preference Y/N	Meets Required Qualifications Y/N	An earned doctorate in mechanical engineering or a closely related discipline. Yes/No	Meet the relevant requirements to be tenured at the rank of professor Yes/No	R3 0-10	R4 0-5	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences 0-15	P2 0-5	P3 0-10	P4 0-15	P5 0-5	Total Application Screening Score	Veteran Interviewed Y/N	Preliminary Interview Score 20	Interview Score 20	Total Application Screening Score	Notes:
1	Lyndi Wittekiend	N	N										0				0	Withdrawn
2	Beth Koen	Y	Y	Yes	Yes	5.00	5.00	5.00	5.00	5.00	5.00	5.00	35	YES	5		40	Preliminary Interview Conducted - Determined un
3	Candice Satchell	N	Y	Yes	Yes	5.00	5.00	10.00	5.00	10.00	15.00	5.00	55		10		65	Alternate #1 - Recommended for Interview
4	Cindy Waggoner	N	Y	Yes	Yes	10.00	5.00	15.00	5.00	10.00	15.00	5.00	65		20		85	Recommended for Interview
5	Elizabeth Mello	N	N	Yes	No								0				0	Does not meet required qualificaiton - Tenured at
6	Tammy Sharp	Y	N	No									0				0	Does not meet required qualificaiton - Education/
7	Nicholas Schellman	N	N										0				0	Incomplete Application

Step 7. If any applicants qualify for Veteran's Preference, mark that in the "Veteran's Preference Verified" column.

According to Chapter 657 of the Texas Government Code, individuals who qualify for veteran's preference are entitled to preference in employment with the University over other applicants who do not have greater qualifications.

	Last Name	First Name	Workflow State (Internal)	Workflow State Entrance Reason	Do you wish to claim Veteran's Preference?	Veterans Preference Verified
☐	▓▓▓▓▓▓▓		Under Review		Yes	Yes
☐	▓▓▓▓▓▓▓		Under Review		Yes	Yes
☐	▓▓▓▓▓▓▓		Under Review		Yes	Yes
☐	▓▓▓▓▓▓▓		Under Review		Yes	Yes
☐	▓▓▓▓▓▓▓		Under Review		Yes	No
☐	▓▓▓▓▓▓▓		Under Review		Yes	No

No.	Applicants Name	Veteran's Preference Verified Y/N	Meets Required Qualifications Y/N
1	Lyndi Wittekiend	N	N
2	Beth Koen	Y	Y
3	Candice Satchell	N	Y
4	Cindy Waggoner	N	Y
5	Elizabeth Mello	N	N
6	Tammy Sharp	Y	N

Veteran's Preference

- If the total number of individuals interviewed for the position is six or fewer, the state agency is required to interview at least one individual qualified for veteran's employment preference.
- If the total number of individuals interviewed for the position is more than six, the state agency is required to interview at least 20% of total applicants that qualify for veteran's employment preference.
- If the applicant pool does not have any applicants who self-identify as eligible for Veteran's Preference, this interview requirement does not apply.

No.	Applicants Name	Veteran's Preference Verified Y/N	Meets Required Qualifications Y/N	An earned doctorate in mechanical engineering or a closely related discipline. Yes/No	Meet the relevant requirements to be tenured at the rank of professor Yes/No	R3 0-10	R4 0-5	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences 0-15	P2 0-5	P3 0-10	P4 0-15	P5 0-5	Total Application Screening Score	Veteran Interviewed Y/N	Preliminary Interview Score 20	Interview Score 20	Total Application Screening Score	Notes:
1	Lyndi Wittekiend	N	N										0				0	Withdrawn
2	Beth Koen	Y	Y	Yes	Yes	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3	YES	5		40	Preliminary Interview Conducted - Determined un
3	Candice Satchell	N	Y	Yes	Yes	5.00	5.00	10.00	5.00	10.00	15.00	5.00	55			10	65	Alternate #1 - Recommended for Interview
4	Cindy Waggoner	N	Y	Yes	Yes	10.00	5.00	15.00	5.00	10.00	15.00	5.00	65			20	85	Recommended for Interview
5	Elizabeth Mello	N	N	Yes	No								0				0	Does not meet required qualificaiton - Tenured at t
6	Tammy Sharp	Y	N	No									0				0	Does not meet required qualificaiton - Education/]
7	Nicholas Schellman	N	N										0				0	Incomplete Application

Step 8. For positions listed as 'Open Until Filled', the committee should set the full consideration date. All applicants must be reviewed and included on the matrix, no matter their application date.

No.	Applicants Name	Veteran's Preference Verified	Meets Required Qualifications	An earned doctorate in mechanical engineering or a closely related discipline.	Meet the relevant requirements to be tenured at the rank of professor	R3	R4	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences	P2	P3	P4	P5	Total Application Screening Score	Veteran Interviewed	Preliminary Interview Score	Interview Score	Total Application Screening Score	Notes:
		Y/N	Y/N	Yes/No	Yes/No	0-10	0-5	0-15	0-5	0-10	0-15	0-5		Y/N	20	20		
1	Lyndi Wittekiend	N	N										0				0	Withdrawn
2	Beth Koen	Y	Y	Yes	Yes	5.00	5.00	5.00	5.00	5.00	5.00	5.00	35	YES	5		40	Preliminary Interview Conducted - Determined un
3	Candice Satchell	N	Y	Yes	Yes	5.00	5.00	10.00	5.00	10.00	15.00	5.00	55		10		65	Alternate #1 - Recommended for Interview
4	Cindy Waggoner	N	Y	Yes	Yes	10.00	5.00	15.00	5.00	10.00	15.00	5.00	65		20		85	Recommended for Interview
5	Elizabeth Mello	N	N	Yes	No								0				0	Does not meet required qualificaiton - Tenured at t
6	Tammy Sharp	Y	N	No									0				0	Does not meet required qualificaiton - Education/
7	Nicholas Schellman	N	N										0				0	Incomplete Application

Step 9. After screening each applicant, calculate the applicant's required and preferred scores to determine the top candidates.

   o Only applicants that meet the minimum requirements should be interviewed.

Instructions for moving the applicants to the appropriate workflow state can be found in the Faculty Recruitment Toolbox under the Search Committee Resources – Applicant Workflow Status.

Step 10. At the conclusion of the final interviews, the search committee should meet to determine which candidates, if any, to recommend for hire. The search committee may choose to provide rankings, strengths and weaknesses, determination of acceptable and unacceptable candidates, and other types of feedback in its recommendation. The search committee chair forwards the recommendation to the department chair or school director.

Step 11. The search committee chair is responsible for preparing the final hiring matrix and changing applicants to the appropriate state in the online system.
- Applicants who do not meet qualifications or who are eliminated during the review process should be designated as "Not Hired" with the most appropriate reason for non-selection (e.g., Does Not Meet Required Qualification–Degree, Incomplete Application, Low Matrix Score, Declined Interview).
- Applicants who were interviewed should be moved appropriately (e.g., Interviewed – Not Selected, Recommended for Hire).

Preparing the Final Matrix

o Add the final interview scores, rankings, or acceptable/unacceptable to the 'Interview' column.
o Update the 'Notes' column to reflect applicants' outcome (e.g., Selected for Hire, Interviewed – Declined Offer, Interviewed – Not Selected, Low Matrix Score, Does Not Meet Qualifications)
o If posting was listed as Open Until Filled, all applicants must be reviewed and included on the matrix, no matter the application date.

No.	Applicants Name	Veteran's Preference Verified Y/N	Meets Required Qualifications Y/N	An earned doctorate in mechanical engineering or a closely related discipline. Yes/No	Meet the relevant requirements to be tenured at the rank of professor Yes/No	R3 0-10	R4 0-5	Demonstrated record of discipline specific research publications in internationally recognized journals and conferences 0-15	P2 0-5	P3 0-10	P4 0-15	P5 0-5	Total Application Screening Score	Veteran Interviewed Y/N	Preliminary Interview Score 20	Interview Score (Ranking/Unacceptable/Acceptable) 20	Total Application Screening Score	Notes:
1	Lyndi Wittekiend	N	N										0				0	Withdrawn
2	Beth Koen	Y	Y	Yes	Yes	5.00	5.00	5.00	5.00	5.00	5.00	5.00	35	YES			40	Preliminary Interview Conducted - Determined unacceptable by Committee
3	Candice Satchell	N	Y	Yes	Yes	5.00	5.00	10.00	5.00	10.00	15.00	5.00	55		1		65	Alternate #1 - Not Interviewed
4	Cindy Waggoner	N	Y	Yes	Yes	10.00	5.00	15.00	5.00	10.00	15.00	5.00	65		2	15	100	Interviewed - Selected for Hire
5	Elizabeth Mello	N	N	Yes	No								0				0	Does not meet required qualificaiton - Tenured at the rank of professor
6	Tammy Sharp	Y	N	No									0				0	Does not meet required qualificaiton - Education/Degree
7	Nicholas Schellman	N	N										0				0	Incomplete Application

Additional Notes on Reviewing Applicants

1. All applicants (even those who are withdrawn or submitted incomplete applications) are listed on the hiring matrix.

2. All protected veterans are marked on the matrix (and if there are any who are minimally qualified, that at least one was given an interview).

3. The required and preferred qualifications listed match the job posting (nothing missing, nothing added that wasn't listed in the posting).

4. For those candidates who are marked on the matrix as "Does Not Meet Minimum Requirements," at least one qualification must be marked on the matrix as not met.

For assistance, please contact Talent Acquisition at 512.245.2557 or talent@txstate.edu.

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