

How to Use The Hiring Matrix

The Hiring Matrix is a tool designed to objectively and accurately assess applicants' qualifications based only on job-related criteria to ensure hiring decisions are fair and equitable. The hiring manager must complete a hiring matrix indicating which knowledge, skills, and abilities each applicant needs to be considered qualified for the position.



The hiring matrix template can be found in the Recruiting and Hiring section of the Manager's Toolkit located on the HR website: [hiring matrix tool](#). This tool is a living document that may be updated or revised at any time. Hiring managers may use this template when screening applications to ensure all required data for review by the Office of Equity and Inclusion is included. It is highly encouraged that matrices be submitted in this Excel spreadsheet format as this tool was developed with the intent to arrange, organize, calculate, and display justification for selection or no selection of candidates as needed. The steps to complete the hiring matrix are as follows.

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.

Job Title:		Administrative Assistant																			
Job Number:		REQUIRED						PREFERRED													
NO.	APPLICANTS	DOES NOT MEET MIN REQUIREMENTS	Experience answering multi-line phones	Experience prioritizing workload	Experience in Microsoft Office products, including Microsoft 365	Experience working in a database	High school diploma/GED	APPLICATION SCORE	Two plus years of experience in customer service	Ability to speak and understand Spanish (bilingual)	Bachelor's degree or equivalent experience or some college-level course work	Experience using Slate CRM software	Experience using Banner SIS/ERM	PREFERRED SCORE	APPLICATION / PREFERRED GRAND TOTAL	VETERAN PREFERENCE VERIFIED	PHONE INTERVIEW (if used in screening process)	INTERVIEW SCORE	REFERENCE SCORE	TOTAL SCORE	NOTES
		Assigned Weight	X	1	1	1	1	1	5	1	1	1	1	1	5	10	✓	1	15	1	
2	Applicant 1		1	1	1	1	1	5	1	1	0	1	1	4	9	✓	1	15		25	Recommend for hire
3	Applicant 2		1	1	1	1	1	5	0	1	1	0	0	2	7		1	14		22	Alternate
4	Applicant 3		1	1	1	1	1	5	1	0	0	1	1	3	8		1	12		21	Interviewed - Not Hired
5	Applicant 4		1	1	1	1	1	5	1	1	1	0	0	3	8		1	10		19	Interviewed - Not Hired
8	Applicant 5		1	1	1	1	1	5	0	0	0	0	0	0	5					5	Withdraw
9	Applicant 6	X	0					0						0	0					0	Does not meet minimum q
10	Applicant 7	X	1	1	0			0						0	0					0	Does not meet minimum q
11	Applicant 8	X	0					0						0	0					0	Does not meet minimum q
12	Applicant 9	X	1	1	0			0						0	0					0	Does not meet minimum q
13	Applicant 10	X	0					0						0	0					0	Incomplete application
14																					

2.

Use the blank column headers to list the required qualifications and preferred qualifications. Only qualifications that are listed on the job posting can be used on the matrix. In the row "Assigned Weight" below the qualifications, indicate the scoring range for each qualification [yes (1) /no (0), 1-5, 1-10, etc.]

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8	Applicant 5		1	1	1	1	1	5	0	0	0	0	0	0	5					5	Withdraw
9	Applicant 6		X	0				0						0	0					0	Does not meet minimum q
10	Applicant 7		X	1	1	0		0						0	0					0	Does not meet minimum q
11	Applicant 8		X	0				0						0	0					0	Does not meet minimum q
12	Applicant 9		X	1	1	0		0						0	0					0	Does not meet minimum q
13	Applicant 10		X	0				0						0	0					0	Incomplete application
14																					

3.

Enter the names of all applicants, even those who have withdrawn or submitted incomplete applications. You are not required to evaluate these applicants, though 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.

4.

Applicants must be evaluated based on the information provided as part of the employment application, resume, cover letter, and additional documentation required in the job posting.

5.

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

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6.

When scoring applicants on the matrix, each column should indicate whether the applicant meets the specified qualification: if qualified, 1 or higher depending on predetermined scoring range and (0) if not qualified for the position.

- A) Once you reach a required qualification that is not met, you do not have to continue scoring the applicant further.
- B) For applicants who are missing at least one required qualification, mark them with an 'X' in the "Does Not Meet Required Qualifications" column.

*Note - Having a low matrix score is not equivalent to not being minimally qualified, regardless of whether you have chosen a minimum matrix score to merit an interview.

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		Assigned Weight	X	1	1	1	1	1	5	1	1	1	1	1	5	10	✓	1	15	1	
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8	Applicant 5		1	1	1	1	1	5	0	0	0	0	0	0	5					5	Withdraw
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11	Applicant 8		X	0				0						0	0					0	Does not meet minimum q
12	Applicant 9		X	1	1	0		0						0	0					0	Does not meet minimum q
13	Applicant 10		X	0				0						0	0					0	Incomplete application
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7.

After screening each applicant, calculate the applicant's required, preferred, and total scores to determine the top candidates for an interview. Only applicants that meet the minimum requirements should be interviewed. The university requires at least three candidates to be interviewed.

8.

If you have minimally qualified candidates who qualify for Veterans Preference, at least one must be interviewed. (If interviewing more than 6 candidates, you will be required to interview more than 1 qualified veteran. For more information on Veteran's Preference, refer to this [flowchart](#)).

9.

Once interviews conclude and the interview scores have been entered, the top-scoring candidate should be recommended for hire.

10.

When submitting the Recommendation for Hire in PeopleAdmin, upload the hiring matrix (along with the other required documents listed on slide 13) to the hiring proposal documents. The hiring manager will route the Rec for Hire to Equity and Inclusion for approval.

Equity and Inclusion will review:

Hiring Matrix

- 1.) All applicants (even those who are withdrawn or submitted incomplete applications) are listed on the 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.
- 5.) If candidates remove themselves (withdraw their application, decline an interview, or decline the job offer), indicate that they have withdrawn in the Notes column on the far right of the matrix.
- 6.) For a copy pool: note on the matrix the job posting numbers for each applicant who is being offered a position.

Equity and Inclusion will review:

PeopleAdmin/Applicant Statuses

1.) Applicant Statuses (Not Hired, Interviewed – Not Hired, Recommended for Hire, Alternate) should reflect the data in the matrix. These applicant statuses are used when pulling data for reporting purposes. The candidates must be coded appropriately to reflect the hiring managers decisions regarding each specific candidate so that our applicant data is as correct and complete as possible.

Note - For detailed instructions on screening and updating applicant's status in PeopleAdmin, please visit the [Applicant Screening and Creating a Hiring Proposal User Guide](#) located in the Manager's Toolkit.

- 2.) If an applicant's status in PeopleAdmin is "Not Hired", it should be clear from the matrix which required qualification they are missing
- A. Indicate which requirement the applicant is missing when moving the applicant in People Admin for clarity.
 - B. For example, if an applicant did not meet the required qualification of "Experience with Microsoft Word", the hiring matrix will show a "0" in the column for the qualification, the applicant status will be moved to "Not Hired" in PeopleAdmin and the reason selected from the drop-down menu "Does Not Meet Required Qualifications" and noted "Does not have Microsoft Word experience."
 - C. Applicants with incomplete applications should be moved to "Not Hired" in PeopleAdmin, select 'Other' from the drop-down menu, and note that applicant was not considered due to an incomplete application (i.e. "Incomplete application - missing cover letter").

Equity and Inclusion will review:

PeopleAdmin/Applicant Statuses Continued

- 3.) For applicants that meet the minimum requirements but are not selected for an interview, their status should be updated to “Not Hired” and marked as “Met Required Qualifications, but Low Matrix Score” from the drop-down menu.
- 4.) All applicants who are interviewed but not selected for hire (or as an alternate) should be moved to “Interviewed – Not Hired” and the reason should be selected from the drop-down menu.
- 5.) For those who are deemed as acceptable alternates, they should be moved to “Alternate” and select the appropriate rank; for example, the first alternate will be ranked 1.
 - A. If you have selected alternates, it is important to mark them as such in PeopleAdmin. If you need to fall back on an alternate, the review process will already be done as Equity and Inclusion approved the candidate as an alternate.
 - B. For candidates who are not marked as alternates in the system, Equity and Inclusion will need to review the new Rec for Hire for those alternates
- 6.) For the applicant recommended for hire, their PeopleAdmin status should be moved to “Recommend for Hire” and a brief justification for the hiring decision should be noted in the explanation box as well as on the matrix (you may only have one candidate recommended for hire from the applicant pool).

Equity and Inclusion will review:

Required documentation to initiate Rec for Hire Process:

- 1.) [Hiring Matrix](#)
- 2.) [Two employment verifications](#)
- 3.) [Signed criminal background inquiry release form](#)
- 4.) If special approval was needed from Equity and Inclusion (interviewing less than 3 candidates, permission to copy a pool, etc.), the email request and approval must be attached as an 'additional document'

11.

If the position is not being filled, contact the Talent Acquisition team to move the position to "Closed – No Hire" workflow state in PeopleAdmin prior to routing it to Equity & Inclusion.

For positions closed as No Hire, the completed Hiring Matrix must be attached to the posting documents before routing to Equity and Inclusion. If the position closed for reasons unrelated to the applicant pool, note this on the matrix. You will not be required to score applicants in this case. Otherwise, make sure all applicants are scored completely with clear notes indicating why no one was recommended for hire from the applicant pool.

12. Sample Matrix

Job Title:		Administrative Assistant																			
Job Number:		REQUIRED						PREFERRED													
NO.	APPLICANTS	DOES NOT MEET MIN REQUIREMENTS	Experience answering multi-line phones	Experience prioritizing workload	Experience in Microsoft Office products, including Microcost 365	Experience working in a database	High school diploma/GED	APPLICATION SCORE	Two plus years of experience in customer service	Ability to speak and understand Spanish (bilingual)	Bachelor's degree or equivalent experience or some college-level course work	Experience using Slate CRM software	Experience using Banner SIS/ERM	PREFERRED SCORE	APPLICATION / PREFERRED GRAND TOTAL	VETERAN PREFERENCE VERIFIED	PHONE INTERVIEW (if used in screening process)	INTERVIEW SCORE	REFERENCE SCORE	TOTAL SCORE	NOTES
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8	Applicant 5		1	1	1	1	1	5	0	0	0	0	0	0	5					5	Withdraw
9	Applicant 6		X	0				0						0	0					0	Does not meet minimum q
10	Applicant 7		X	1	1	0		0						0	0					0	Does not meet minimum q
11	Applicant 8		X	0				0						0	0					0	Does not meet minimum q
12	Applicant 9		X	1	1	0		0						0	0					0	Does not meet minimum q
13	Applicant 10		X	0				0						0	0					0	Incomplete application
14																					

Questions regarding the use of the hiring matrix should be directed to the Office of Equity and Inclusion at 512.245.2539 or equityinclusion@txstate.edu

Questions regarding the functionality and scoring should be directed to the Talent Acquisition team at hr@txstate.edu.

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