



## County of San Bernardino

# PERSONNEL (OPF) FILE

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The Personnel (OPF) File is the **official** County personnel file, which is maintained at Employee Benefits and Services Division-Human Resources (EBSD-HR) and contains all records pertaining to an individual employee's County employment.

### REFERENCES

Current County Consolidated Memorandum of Understanding (MOU), Attorney MOU, Specialized Peace Officer & Specialized Peace Officer - Supervisory MOU

### FORMS REQUIRED

Personnel (OPF) File Request To Review/Statement of Release 

### MANDATORY FIELDS

Employee ID; Rcd No.;  
Last Name; First Name; Social  
Security Number; Employment  
Dates; Home Telephone; Work  
Telephone

### GENERAL INFORMATION

In addition to the official personnel file at EBSD-HR, departments may maintain individual personnel files for their employees.

Personnel records are confidential and access shall be limited to the Director of HR, the appointing authority, the Board of Supervisors or their authorized representatives. Employees currently employed by the County of San Bernardino, and/or their representatives, designated by the employee in writing, will be allowed to review the employee's personnel records during regular business hours. *Refer to the appropriate MOU, Access to Personnel Records Article*

Current County employees who wish to review their personnel file must complete the top section of the Personnel (OPF) File Request To Review/Statement of Release and submit it to EBSD-HR at least 24 hours in advance. The employee may call to schedule an appointment with EBSD-HR to review the file.

There is no charge to review the personnel file, however, there will be a nominal fee charged for copies of documents in the file.

**Note:** Former County employees have the same access to their personnel file as current employees, including submitting the request in writing and being charged a reasonable copying charge.

A subpoena is required when the request to review the file is from a third party (i.e. insurance company, etc.). If a department receives a subpoena directly, the document should be forwarded to EBSD-HR for review to insure the legal requirements are met.

*Refer to department guidelines for individual procedures*

### PAYROLL SPECIALIST RESPONSIBILITIES

- ◆ Provide form to employee upon request

## ITEMS TO BE PLACED IN PERSONNEL (OPF) FILE

Items that may be placed in the Personnel (OPF) File include, but are not limited to the following:

Advanced Step Hiring Request	Temporary Performance of Higher Level Duties
Assignment To Vacant Higher Position (Exempt) (ATVHP)	Transfer Request
Beneficiary Designation	Underfill Agreement
Bilingual Assessment & Compensation Forms	Vision Plan Dependent Enrollment/Change Form (Exempt and Safety/Safety Management & Supervisory)
Dental Plan Enrollment/Change Form	Voluntary Time Off (VTO)
Dependent Care Assistance Plan Enrollment (DCAP)	Waiver of Probation
Demotion (Voluntary)	Waiver of Probation and Examination
Dual Appointment Agreement	Work Performance Evaluation (WPE)
Employment Application	Work Performance Improvement Plan (WPIP)
Employment Eligibility Verification	Work Restriction
Employment Status and Wage Notification	Workers' Compensation forms
Extra-Help Appointment Agreement	
Job Action Request (JAR)	
Job Share Contract	
Leave Extension Request (Vacation/Holiday)	
Leave Request for Extended Sick and Special Leave	
Leave Restriction	
Letter of Commendation	
Letter of Counseling	
Letter of Discussion	
Letter of Instruction	
Letter of Reprimand	
Licenses and Certifications	
Medical Plan Enrollment/Change Form	
Notice of Proposed Disciplinary Action	
Notice of Medical Evaluation	
Opt-Out/Waiver Election Agreement for Medical and/or Dental Coverage	
Order of Disciplinary Action (i.e., Order of Dismissal)	
Personal Information/Emergency Contacts	
Occupational Injury/Illness Personal Physician Request	
Personnel Requisition (PR)	
Premium Deduction Election	
Provisional Appointment Agreement	
Request for Requalification	
Retirement System Contribution Election	
Safety Accident Review Board (SARB) Results	
Salary Savings 401(k) Defined Contribution Participation Agreement	
Salary Savings 457(b) Deferred Compensation Plan Participation Agreement	
Salary Savings PST Deferred Compensation Plan Participation Agreement	
Separation Report	
Special Assignment Compensation (SAC) (Exempt Only)	
Suggestion Award	