



## County of San Bernardino PERSONNEL REQUISITION

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A manual Personnel Requisition (PR) is required by Employment-Human Resources (HR) to process most hiring transactions, including: See Original Certification (SOC), Voluntary Demotions, Change of Appointments, Job Changes, PSD/Contracts, Dual Appointments and other special circumstances (i.e., Provisional Appointments, Underfills, Appointments to Additional Concurrent Positions, Direct Hire, and Civil Service Commission actions).

### REFERENCES

Current County Memoranda of Understanding (MOU); Exempt Compensation Plan; Personnel Rules; Ordinance

### FORMS REQUIRED

Personnel Requisition 

### MANDATORY FIELDS

Section A, B, Appointing Authority

### GENERAL INFORMATION

If an Online PR was prepared for any of the actions requested a manual PR is **not** needed, except for SOC.

**Note:** For instructions regarding the Online Personnel Requisition refer to the EMACS website. For additional information contact Employment-HR.

### SECTION A - ACTION REQUESTED

#### 1. See Original Certification (SOC)

If, after using a Certification List to fill a position, a department finds that there is a need to fill an additional position(s) of the same Job Code Title, type, area and shift, the department may use a copy of the same list, provided the certification list was referred within the last twelve (12) months. Enter the following information for the **original certification list** in **Section C - See Original Certification (SOC)**:

- Date of requisition
- Certification factors, such as Job Type, Shift, Area, Skills (if any)
- Requisition number

#### 2. Change of Appointment

A Change of Appointment may be requested for a non-regular employee to be placed in a regular budgeted position in the same Job Code Title within the same department if the person was originally hired from an eligible list used for regular appointments and has completed six (6) months of satisfactory service. The employee will be subject to a probationary period in the regular position.

This action also requires a memo from the requesting department's HRO, which provides requisition number and certification factors for the original extra-help/recurrent hire.

#### 3. Extra-Help/Recurrent Appointment

Extra Help - Appointment of persons to cover needs including but is not limited to: seasonal peak workloads, emergency workloads of limited duration, vacation and paid sick leave relief, and other situations involving a fluctuating staff. No Extra-Help appointment shall exceed twelve (12) months without approval of the Director of Human Resources or designee.

Recurrent - Appointment of persons to a position for an indefinite period on an on-call basis. This type of appointment may be for eighty (80) hours or less per pay period and does not require work in twenty-six (26) consecutive pay periods per year. Recurrent employees may be placed on recurrent employee rosters maintained by the department called to work at the discretion of the department. *Refer to Checklist for New Hire – Extra- Help/Recurrent/PSE. Also, refer to the County Policy Manual, No. 07-12SP.*

4. PSD/Initiate New Contract

Change of contract position for an existing PSD contract employee. Utilized for progression into the next level in class series (e.g., upgrading Teacher Aide I to Teacher Aide II). Also applicable to upgrade an incumbent from a 9-month contract to a 12-month contract or from a 12-month contract to a 9-month contract.

5. Voluntary Demotion

A Voluntary Demotion is the appointment of an employee from an assigned position to a position in a different Job Code Title for which the maximum rate of pay is lower than the employee's current position. Employees must meet the minimum requirement(s) for the new position. The approval of both appointing authorities is required. *Refer to Voluntary Demotion procedure.*

6. Job Change

A Job Change is the appointment of an employee with regular status from a position in a Job Code Title to a position in another Job Code Title with the same maximum rate of pay. Employees must meet the minimum requirement(s) for the new position. *Refer to Job Change procedure.*

7. Dual Appointment - (CAO Approval Required)

A Dual Appointment is the appointment of two (2) full-time employees to the same budgeted regular position for a limited period of time in order to facilitate training, make assignments to a position which is vacant due to an extended authorized leave of absence, or in an emergency. In **Section D**, provide justification and the plan to resolve the dual appointment, and, if requesting a certification list, indicate the certification factors for the position. If you are not requesting a certification list, and are hiring via SOC process, complete **Section C** and **Section D** (justification/plan to resolve dual appointment section only), and send the original, completed PR to the assigned Finance Analyst via email, I/O Mail or fax.

**Important Note:** When an existing employee is being moved from his/her current position to another position that will result in a dual appointment (position number change only), a manual PR is not required. In these cases, a Job Action Request (JAR) form must be completed, and the appointing authority or designee must write a justification memo explaining the reason for the dual appointment and the plan to resolve (if applicable). Submit the completed JAR to EMACS-HR (0030), and submit the justification memo to CAO Analyst for review and approval. *Refer to Dual Appointment procedure.*

8. Appointment to Additional Concurrent Position - (CAO Approval Required)

Under unusual circumstances, with the approval of the appropriate appointing authorities, and the Director of HR, an employee in a regular position may choose to also work in a Public Service Employee (PSE), Extra-Help or Contract capacity for the same or another appointing authority. Send the original, completed PR to the assigned Finance Analyst via email, I/O Mail or fax. *Refer to Appointment to Additional (Concurrent) Position procedure.*

9. Appointment - Unclassified Regular Positions Only - (CAO Approval Required)

Appointment to an Unclassified REGULAR position only – This does not apply to non-regular positions such as Public Service Employees, Extra Help/Recurrent, etc. Send the original, completed PR to the assigned Finance Analyst via email, I/O Mail or fax.

## 10. Underfill

An Underfill occurs when a vacant budgeted position is filled with a Job Code Title at a lower or equal rate of pay. Underfills are used for budgetary or trainee purposes only. Indicate the type of underfill requested in Section A. *Refer to Underfill procedure.*

## 11. Public Service Employee (PSE)

A County classification used to employ individuals assigned to entry-level duties in a variety of fields and occupations. PSEs are not certified from an eligible list, but rather individual departments recruit them. PSE appointments shall not exceed twelve (12) months without approval of the Director of Human Resources or designee. Complete a PR, check box 11 for "Public Service Employee" in the Action Requested Section A. *Refer to Checklist for New Hire – Extra- Help/Recurrent/PSE. Also, refer to the County Policy Manual, No. 07-12SP.*

**Note:** An original PR for the following appointment types DO NOT require Employment-HR review/approval: PSEs, including CONFIRE PSEs – 40642 job code, County Fire PSEs – 50207 job code, and Special Districts PSEs – 50104 job code. Forward completed PRs for the aforementioned appointments directly to EMACS-HR (0030). A copy will be returned to the department once processed.

## 12. Other Appointments

- ◆ Direct Hire - A Direct Hire is the rehire of an employee by their former employing department without examination. Employees who resigned, retired, voluntarily demoted, or accepted employment with another County department may be rehired in any classification in which they held regular status and satisfactory work performance upon request of their former employing department.

Complete a PR, check "Other" in the Action Requested Section A, and indicate "Direct Hire."

- ◆ Provisional - A Provisional appointment is the appointment to a position of an individual who is not on an eligible list for the Job Code Title requested.

Requests for provisional appointments are allowable under any one of the following conditions:

- When an eligible list does not exist for the Job Code Title and a comparable list is not available.
- The eligible list contains less than three names and the appointing authority has filed a valid written objection to the Director of Human Resources (HR) to the employment of each person on the list.
- Persons on the list are not available for appointment under the terms and conditions of employment prescribed for the position.

Complete a PR, check "Other" in the Action Requested Section A, and indicate "Provisional". An original PR, a Provisional Appointment Agreement and an employment application must be sent to Employment-HR (0440) for prior approval. *Refer to Provisional Appointment procedure.*

- ◆ Per Diem\* - Appointments for unclassified Per Diem positions. Complete a PR, check "Other" in the Action Requested Section A, and indicate "Per Diem."
- ◆ Paid Intern\* - Appointments for paid internships. Complete a PR, check "Other" in the Action Requested Section A, and indicate "Paid Intern."
- ◆ Returning Retirees\* - Retired SBCERA members may return to work for San Bernardino County upon meeting eligibility requirements (e.g., exceeded 180-day or twelve-month waiting period as applicable). Returning Retirees may not work more than 960 hours in any fiscal year. Complete a PR, check "Other" in the Action Requested Section A, and indicate "Returning Retiree." *Refer to Returning Retiree procedure.*

**\*Note:** An original PR for the following appointment types DO NOT require Employment-HR review/approval: Per Diem, Paid Intern, and Returning Retirees. Forward completed PRs for the aforementioned appointments directly to EMACS-HR (0030). A copy will be returned to the department once processed.

## **GROUP/CAO REVIEW SECTION**

PRs for Dual Appointment, Appointment to Additional (Concurrent) Position, and Unclassified Regular Appointments require County Administrative Office (CAO) approval. Send the completed, original PR to the assigned Finance Analyst via email, I/O Mail or fax. See section A instructions above, for PR completion procedures.

## **ADDITIONAL INFORMATION**

“Up or Out” Trainee Promotion - Trainee Job Code Titles are considered to be an “up or out”, which means the employee must qualify for the journey level Job Code Title or be terminated or returned to their former Job Code Title. Promotion to the journey level position from a Trainee Job Code Title does not require a PR. Instead, upon satisfactory completion of the items listed in the Underfill Agreement, the department should complete a Trainee Promotion form. *Refer to Promotion procedure.*

## **PAYROLL SPECIALIST RESPONSIBILITIES**

- ◆ Complete PR, audit for completeness, and retain a copy for department file.
- ◆ Submit completed PR to department Appointing Authority for approval.
- ◆ Once approved PR is received from department Appointing Authority, retain a copy for department file, then forward original PR to Employment-HR (0440), if CAO approval is not required.
- ◆ Forward original PR to department CAO Analyst, if CAO approval is required.
- ◆ CAO Analyst will email completed PR or forward original PR to Employment-HR (0440). An electronic or hard copy will be provided to the department.
- ◆ Complete appropriate JAR packet, audit for completeness, and retain a copy for department file.
- ◆ Verify that EMACS has been updated to reflect the requested action.

*Refer to department guidelines for individual procedures.*

## **DEADLINES**










Refer to Master Calendar for EMACS Processing








## **DISTRIBUTION GUIDELINES**

Unless indicated otherwise, all original PRs must be submitted to Employment-HR (0440). Upon approval of the PR, Employment-HR will forward original to EMACS-HR for processing and a copy will be returned to the department once processed.

The following PRs DO NOT require Employment-HR review/approval and should be submitted directly to EMACS-HR (0030) or via email: PSEs, including CONFIRE PSEs – 40642 job code, County Fire PSEs – 50207 job code, Special Districts PSEs –50104 job code), Per Diem, Paid Intern, and Returning Retirees. A copy will be returned to the department once processed.

## **RELATED FORMS/PROCEDURES**

- Checklist for Concurrent Appointment (Additional Position) 
- Checklist for Contract to Extra-Help 
- Checklist for Contract to Regular 
- Checklist for Demotion (Voluntary) 
- Checklist for Extra-Help/Recurrent/PSE to Regular 
- Checklist for Extra-Help to Recurrent 
- Checklist for Job Change 
- Checklist for New Hire – Exempt 
- Checklist for New Hire – Extra-Help/Recurrent 

- Checklist for New Hire – PSE 
- Checklist for New Hire – Regular/Part-Time/Reemployment (Rehire) 
- Checklist for Promotion or Reclassification 
- Checklist for PSE to Extra-Help 
- Checklist for Recurrent to Extra-Help 
- Checklist for Regular to Extra-Help/Recurrent 
- Checklist for Return from Leave (Without Right) 
- Checklist for Transfer without Promotion/Lateral Transfer 