



# County of San Bernardino UNDERFILL

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An appointment made to a vacant regular position from an appropriate eligible list of a lower Job Title (classification) for trainee or budgetary purposes is considered an Underfill.

## REFERENCES

Personnel Rules

## FORMS REQUIRED

Underfill Agreement   
Personnel Requisition (PR)

## MANDATORY FIELDS

See Below  
Refer to Personnel Requisition procedure

## MANDATORY FIELDS

Type of Underfill (check Trainee or Budgetary); Employee ID; Rcd No.; Last Name, First Name; Purpose (check New Hire, Promotion, or Position No. Change); Company; Department; Position No.; Budgeted Job Title; Job Code; Grade/Step; Underfill Job Title; Job Code; Grade/Step; Employee Signature; Supervisor Signature; Appointing Authority Signature; Human Resources Business Partner Signature; Employment-HR Signature

## GENERAL INFORMATION

Underfills can be used for budgetary purposes (the approved budget may have vacant positions for which a lower level is substituted) or for trainee status (a person is hired as a “trainee” who will be promoted to higher status upon completion of all specified requirements).

An Underfill Agreement is required for all underfill appointments. The primary purpose of the Underfill Agreement is to properly inform the employee of their status and the terms of their assignment.

Once a hiring selection has been made, paperwork must be completed to process the Underfill. It is generally the supervisor’s responsibility to request and complete the paperwork necessary to initiate an Underfill Agreement, and to terminate that agreement by the date indicated on the form. *Refer to department guidelines for individual procedures*, if applicable.

### ***Trainee Underfill***

The Trainee Underfill section is completed for an employee who is assigned duties that provide training and experience to qualify for a higher-level Job Title. During the period of a trainee appointment, the trainee shall have probationary status. Appointments to the higher Job Title are also subject to a probationary period. In order to qualify for the higher-level Job Title, the trainee must meet the requirements specified on the Underfill Agreement. If those requirements are not met within the designated timeframe, the trainee will be terminated or returned to the former Job Title in which regular status was held.

The following documents are required to promote a Trainee Underfill in addition to the forms required above once the employee has met the requirements of the Underfill Agreement:

- ◆ Trainee Promotion Form
- ◆ Recent Work Performance Evaluation – Trainee Progress Report showing the employee “Meets Job Standards”

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## ***Budgetary Underfill***

The Budgetary Underfill section is completed for an employee who is assigned to a Job Title at a salary range lower than the budgeted Job Title. The incumbent remains at the lower level Job Title and is not compensated nor assigned the duties of the higher-level Job Title. A budgetary underfill is temporary and must be terminated within 12 months. To terminate a budgetary underfill agreement, the employee must be moved to a position in the budgeted Job Title or the position must be reclassified.

### **PAYROLL SPECIALIST RESPONSIBILITIES**

- ◆ Audit form for completeness
- ◆ Complete appropriate JAR packet and attach a copy of the Underfill Agreement
- ◆ Retain copies for department file
- ◆ Forward original Underfill Agreement with all signatures to Employment-HR (0440)
- ◆ Forward JAR packet and copy of Underfill Agreement to EMACS-HR (0030)
- ◆ Verify that EMACS has been updated to reflect requested action











### **DEADLINES**

Refer to Master Calendar for EMACS processing

### **DISTRIBUTION GUIDELINES**

Employment-HR will send approved copy to department and original to EMACS-HR

### **RELATED FORMS/PROCEDURES**

Checklist for Contract to Regular   
Checklist for Demotion (Disciplinary Action)   
Checklist for Demotion (Voluntary)   
Checklist for Extra-Help/Recurrent/PSE to Regular   
Checklist for Job Change   
Checklist for New Hire-Exempt   
Checklist for New Hire-Regular/Part-Time   
Checklist for Promotion or Reclassification   
Checklist for Transfer without Promotion   
Demotions  
Employment Status and Wage Notification   
Hiring Transactions  
Promotions  
Trainee Promotion  
Transfers (Lateral)  
Work Performance Evaluation (WPE) – Trainee Progress Report 