

POSITION ALLOCATION AND JOB REQUISITION PROCEDURES

PURPOSE: To communicate to County departments the process for establishing new budgeted positions, reallocating existing vacancies to a different classification and requesting recruitment activity to fill budgeted, allocated positions.

SCOPE: This policy applies to all County departments who establish allocated positions within their budget.

POLICY STATEMENT: The Position Allocation and Job Requisition process provides for the establishment and monitoring of approved positions and budgeted funds through coordinated efforts of the Department of Employee Services and the Budget Division of the Finance Department. Recruitment activity may commence only after positions are allocated and funded with Budget approval. This includes positions in the allocated position listing including all regular full time, regular part time, job share and limited term positions.

GENERAL PROCEDURE

Whenever a department wishes to: 1) create and fill a new position, 2) reclassify an existing vacant position prior to recruitment, or 3) refill an existing position, the department must complete necessary forms to authorize the request and provide Department Director approval. This EPP serves to explain the necessary forms and processes for each of these three (3) situations.

The Position Allocation and Job Requisition procedures do not apply to the following two situations: 1) reclassification of existing positions which have a current incumbent, or 2) temporary positions. (Please refer to EPP #18 for information on reclassification procedures or to EPP #31 for information on the employment of temporary employees.)

APPROVAL PROCESS AND REQUIRED DOCUMENTATION

Refill of an Existing Position

The department must request a **Job Requisition (JR)** form from the Department of Employee Services (DES) to refill an existing position at the same classification level. The department should supply the following information to DES so that a Job Requisition form can be created for department authorization to conduct recruitment activity:

- Classification of the position to be filled
- Position number
- Current or last incumbent
- Recruitment Contact (name and phone number of supervisor who will work with DES on recruitment processes)

DES will open a Job Requisition on PeopleSoft for the position to be filled. The allocated position number is tied to the allocated position listing containing the classification of the position. DES will

create and email a Job Requisition form containing the above information to the department for approval. The department should verify the information on the form and obtain the approval signature of the Department Director or designated representative.

Once the signed Job Requisition is returned to DES, the Recruitment Manager will review and approve the Job Requisition form, list the name and telephone number of the Human Resources Analyst assigned to conduct the recruitment and return a copy to the department's recruitment contact. DES will contact the department if any additional forms or information are required to obtain final approval.

Reclassification and Refill of an Existing Position

Prior to DES issuing a Job Requisition, the department may request to reclassify a vacant position to a different classification. A reclassification and reallocation of the position must take place prior to issuing a Job Requisition in order for the allocated position listing to correctly list the classification assigned to the position number. A department initiates this process by completing a "New Position or Reclassification of Vacancy" Request form available on the DES Intranet page. This form provides documentation of the following information:

- The position number to be reclassified (must be vacant prior to final reallocation)
- Last Incumbent
- Present Classification
- Requested Classification and corresponding Job Code

The form must contain the approval signature of the Department Director or designated representative. A completed Position Classification Questionnaire (PCQ) must also be attached to the Request form. The PCQ provides the documentation necessary to review the request and determine if the position can be reclassified to the requested classification, or a different classification.

The Department of Employee Services will determine the appropriate classification for the position based on information provided in the Position Classification Questionnaire and through interviews as necessary. The Department of Employee Services will then approve and forward the Request to Reclassify a Vacancy form to the Budget Division. The Budget Division is responsible for maintaining the allocated position listing and will reallocate the position in PeopleSoft. If approved and returned by the Budget Division, the Personnel Division will issue a Job Requisition, if requested by the department, for recruitment activity.

New Position(s)

The department must initiate a request for a new position by completing a "New Position or Reclassification of Vacancy" Request form available on the DES Intranet page. This form should indicate the request is for a New Position and include the following attachments:

- A signed PCQ and current organizational chart.
- If the new position request is outside of the annual budget adoption process the department must attach a letter addressed to the County Administrator for approval of a new position, **or**
- A copy of a staff report from which the Board of County Commissioners approved the grant application with specific reference to the additional FTE.
- Appropriate budget change forms should either be attached or sent directly to the Budget Office for documentation on how the position will be funded.

The Department of Employee Services will determine the appropriate classification for the new position based on information provided in the Position Classification Questionnaire and through interviews as necessary. Once a classification allocation is finalized, the Department of Employee Services will then approve and forward the New Position form to the Budget Division for Budget Manager review and approval. The Budget Division is responsible for securing County Administrator approval to add new positions and for ensuring adequate funds are available to fund the position. Once approved the Budget Division will return the New Position form to the Department of Employee Services with a new position number. The Department of Employee Services will then issue a Job Requisition for recruitment activity, if this is requested by the department.

NOTE: Send the original New Position or Reclassification of Vacancy form(s) and PCQ's directly to the Department of Employee Services. Do not send them to the Board of County Commissioners, the County Administrator's Office or the Budget Division. The Department of Employee Services will coordinate the initial steps in the classification determination process prior to Budget review and approval. The Department of Employee Services will contact the department if any additional forms or information are required to obtain final approval. [During the annual Budget development cycle, departments should send copies of the New Position Forms to the Budget Office and the original forms to DES].

INTERNET LINKS

County Ordinance (<http://www.clackamas.us/code/documents/title2.pdf>)

Forms Used in Position Allocation and Job Requisition Process:

- Job Requisition (Requested from DES. DES generates and sends via email to departments.)
- Request for New Position or Reclassification of Vacancy Form (Available on DES Intranet website)
- Position Classification Questionnaire (Available on DES Intranet Website.)
- Budget Change Request Cover Sheet (Form 100-B) (Available on Finance-Budget Intranet Website.)
- Request For Budget Transfer Between Major Categories (Form 20-B) (Available from Finance-Budget Intranet Website.)
- Request For Supplemental Budget, Dedicated Funds Appropriation, or Transfer from General Fund (Form 30-B) (Available from Finance-Budget Intranet Website)

Additional Resources

Also see:

- EPP 18 Reclassification Procedures <http://www.clackamas.us/des/documents/epp/epp18.pdf>
- EPP 31 Employment of Temporary, Limited Term, and Regular Part-time Employees <http://www.clackamas.us/des/documents/epp/epp31.pdf>