Individual Position Description (PD) Allocation Workflow Chart

January 1, 2020

Write/Review
Position Description (PD)

Start:
Complete & Submit PD in Online Position Description (OPD)

Supervisor:
1) Review/Edit PD
2) Certify PD in OPD

Division:
1) Review/Edit PD:
   a) As work approved by Management
   b) Complete questionnaire in OPD
2) Certify/Approve PD

Department:
1) Review PD
2) Ensure budgetary component
3) Attach staffing chart
4) Certify/Approve PD

Classification Receives PD in OPD

Classification (CLS) Operations Staff
Technical Review Only
Clock starts for Client Service Standard

Technical Review
1) Check for missing information – see action guidelines below
2) Check Position Control Information (PCI) with IRIS-HRM and spreadsheet (i.e: location change) – Correct as needed
3) Convert attachments to *.pdf if saved in Visio or Excel
4) Assign priority to PD if not already accomplished

Action guideline if information is Needed

All information submitted

Return to agency if following are missing:
1) Questionnaire not completed. Exception: Supervisor only updates (Priority 6)
2) OMB approval
3) Missing staffing chart
4) Seasonal status
5) Listed supervisor not on staffing chart
6) Location discrepancy
7) Other technical level discrepancy

NOTE: Annotate discrepancies inside the Comments section before returning

Send to Assignor step

Classification Lead reviews and assigns to Classifier or Department liaison

Allocation of Position
Classifier will:
1) Write analysis and approve an allocation action
2) Request additional information regarding allocation of position
3) Request a second-level review by the Classification Lead, if needed
4) Send to closeout after approval

If Suspended
1) Supervisor provides clarification information.
2) Classifier decides if PD needs to be returned
3) If desk audit is necessary, keep the PD in suspense

Send to Closeout

Closeout
CLS Operations Team will:
1) Check to ensure final actions and PCI page coincide with analysis
2) Check layoff list
3) Closeout position
4) Clock stops for Client Service Standard

OPD notifies agency of action through auto-generated email

CLS Operations Team will:
1) Enter information into IRIS-HRM within 3-days
2) Process any special actions such as bargaining unit changes

FINISH
Filled Position: Payroll Services updates employee information

Vacant Position: Department Human Resource Staff posts Recruitment

Glossary of Terms

Review – analysis of duties, authority, and organizational placement assigned to position, in relation to job class specifications
Agency – Executive Branch Department, Board, or Commission
Allocation – assigning a position to a job class
Reallocation – allocation of a position to a different job class using a full PD
Update – PD noting changes in a position's duties that did not result in a reallocation of the position

Document located at G:\Classification\G:\Classification\3 INDIVIDUAL ALLOCATIONS\
Allocation Team Info