

RPA: Request for Personnel Action

(Position Reclass)

CDFW employees can now reclassify positions through the Human Resources Management System (HRMS). Only Permanent and Limited Term RPA's can be processed with this action. Reclassification includes interchangeable classification that end in 800 serial numbers. For all other RPA types please continue to use the paper process (Form DFW 242).

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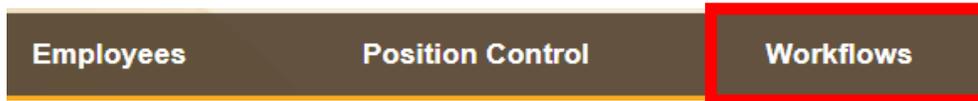
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Initiate an RPA

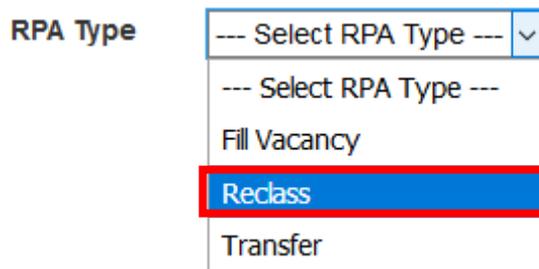
Step 1 Visit [HRMS](#) by clicking on the HRMS shortcut on your desktop.



Step 2 From the HRMS homepage, click on “Workflows” in the main navigation bar:



Step 3 Click on the “Select RPA Type” option:



Step 4 Click on the “Reclass” tab to expand it. Once expanded, all required documents for the RPA will be listed. These documents will be required at different stages in the RPA process - the Application form is not required until the “[Add Proposed Candidate Info](#)” portion of the RPA. Click the “Start” button to initiate an RPA.

RPA Type

Reclass

Reclass

This process is used for a Reclassification including interchangeable classification that end in 800 serial numbers.

Name	Required/Optional	Description
Advertisement (Proposed)	required	MS Word template - Please complete the job specific information. Template
Duty Statement (Current)	required	MS Word template - This document is the same for all duty statements. Please check the correct box in the document header to specify "Proposed" or "Current." Template
Duty Statement (Proposed)	required	MS Word template - This document is the same for all duty statements. Please check the correct box in the document header to specify "Proposed" or "Current." Template
Hiring Justification Request (Current)	required	PDF Document - Please complete and upload. Template
Operating Budget Adjustment(OBA) Form (Current)	when required	PDF document - Complete the form and digitally "sign" the document by clicking in one of the "REQUESTED BY:" fields. Template
Application Form (Current)	required	PDF document STD 678 – On the candidate tab, please attach signed application when candidate is selected.
Screening Criteria (Current)	required	PDF document – Fill in all required fields and upload completed document. *Please ensure rater's name is on the form. Template
Salary Determination (Current)	when required	Salary Determination Worksheet (For HR use only)
Completed Interview Rating Sheets (Current)	required	PDF document - Fill in all required fields and upload completed documents for each rater at the time candidate is selected. *Please include rating sheets with rating scale for each interview question, panel member name, candidate name, date, and final score. Template
Org Chart (Current)	when required	No template available - Use your own format.
Org Chart (Proposed)	required	No template available - Use your own format.
DOF Document (Current)	when required	Please submit a justification memo to be sent to Department of Finance.

Start

Step 5 Enter in the position number for the position you are reclassifying. The other fields are read-only and will populate based on the position number you enter.

Reclass: - This process is used for a Reclassification including interchangeable classification that end in 800 serial numbers.

Current Position Information

Position Number*	565-030-1401-007
Reporting Unit	565-030 Information Technology Systems Branch
Classification	Information Technology Associate
Bargaining Unit	R01 - Professional, Administrative, Financial, and Staff Services
Work Week Group	2
Position Supervisor	Lau, Simon
Last Incumbent	Pandey, Sapana
Final Separation Date	12/31/2019
Last Day Worked Date	12/31/2019
Tenure	Permanent
Time Base	Full Time

Enter the proposed position number for the position you are reclassifying to. Add organization and supervisor name of the proposed position.

Proposed Position Information

Position Number*	566-291-8418-XXX
Reporting Unit:	566-291 LED Reg 2 - North Central Region
Classification:	Fish and Game Lieutenant (Supervisor)
Bargaining Unit:	S07 - S07
Work Week Group:	2
Organization	Data and Technology Division (DTD)
Supervisor*	565-030-1404-002 Lau, Simon

Create **Cancel**

Click the "Create" button to submit your RPA.

Review and Complete Basic Information

Step 1 After creating the RPA, scroll down to the “Basic Information” tab to view the current position information against the proposed information.

Proposed Appointment Tenure: this will populate with the position’s current tenure. If you need to update the position’s tenure, you can do so here.

Number of Months: Add the number of months

Proposed Appointment Time Base: this will populate with the position’s current time base. If you need to update the position’s time base, you can do so here.

Method of Recruitment: Select the method of recruitment. If you select the “Other” option, you must enter comments describing the type of recruitment. This field is required.

Location: Select the county the employee will work in. This field is required.



Proposed Funding

Proposed Funding Show/Hide				
Project	Reporting Structure	Time Fraction	Comments	
No data available in table				
Add				

Step 1 Scroll to the “Proposed Funding” tab and click the “Add” button.

Step 2 Enter in the Project Code, Reporting Structure Code, and Time Fraction for funding the position. Click the “Save” button.

Add Position Funding Show/Hide

Project*

Reporting Structure*

Time Fraction*

Comments*

Save

Add Supporting Documents

- Step 1** Scroll to the “Supporting Documents” tab. Review all required documents. Click the “Browse” button next to a document to attach it.
 Click the “Add other attachment” button to add any other supporting documents not listed.

Supporting Documents			
Name	Required/Optional	Description	File
Advertisement (Proposed)	required	MS Word template - Please complete the job specific information.	<input type="button" value="Browse..."/>
Operating Budget Adjustment(OBA) Form (Current)	when required	PDF document - Complete the form and digitally "sign" the document by clicking in one of the "REQUESTED BY:" fields.	<input type="button" value="Browse..."/>
Org Chart (Proposed)	required	No template available - Use your own format.	<input type="button" value="Browse..."/>
Duty Statement (Proposed)	required	MS Word template - This document is the same for all duty statements. Please check the correct box in the document header to specify "Proposed" or "Current."	<input type="button" value="Browse..."/>
Hiring Justification Request (Current)	required	PDF Document - Please complete and upload.	<input type="button" value="Browse..."/>
DOF Document (Current)	when required	Please submit a justification memo to be sent to Department of Finance.	<input type="button" value="Browse..."/>
Duty Statement (Current)	required	MS Word template - This document is the same for all duty statements. Please check the correct box in the document header to specify "Proposed" or "Current."	<input type="button" value="Browse..."/>
Org Chart (Current)	when required	No template available - Use your own format.	<input type="button" value="Browse..."/>
Screening Criteria (Current)	required	PDF document - Fill in all required fields and upload completed document. *Please ensure rater's name is on the form.	<input type="button" value="Browse..."/>
<input type="button" value="Add other attachment"/>			

Add Program Approvers

- Step 1** Scroll to the “Program Approvers” tab. For complete submission of the RPA, you must identify the appropriate approvers. The approver must be in a supervisor role and be directly related to the hiring of this RPA. You must enter two (2) program approvers. A third approver is optional*. Click the “Save” button to save the RPA in a draft status. Click the “Submit” button to submit your RPA for processing.
 *Note: if a third approver is selected, all three approvers must electronically approve the RPA before it moves to the next step.

Section 3: Assign Program Approvers

For complete submission of the RPA, you must identify the appropriate approvers. The approver must be in a supervisor role and directly related to the hiring of this RPA.

1. HRB will not process the RPA until all required approvers have completed their task.
2. Approvers will be notified via email to log into HRMS to review and approve the RPA.
3. Some Divisions require a third approval. If you are one of the Divisions, please ensure that three approvers are added so the process is not delayed.

Program Approver 1*

Program Approver 2*

Program Approver 3

XRPA - E-ITSB 19-006

i Submitting the RPA will begin the approval process. If you edit this RPA after submission, you will be required to resubmit/restart the approval process.

I confirm this RPA is complete and ready for approval.

Position Control Tab

Your RPA submission has now been sent to the program approvers for review/approval. After the RPA is approved by the program approvers, it will be sent to the Human Resources Branch (HRB) and Executive Review Committee (ERC) for approval.

- Add the mandatory Serial Number for the Proposed Position Number
- If DOF checkbox is clicked for Department of Finance approval for the position
 - Then no information is required for STD 607 fields
 - No effective date is required
- Click Approve Button

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	Advertisement	Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History
Position Control												
Current Position Number	565-030-1401-007											
Proposed Position Number	566-291-3418-XXX											
Serial Number*	<input type="text" value="123"/>											
Reporting Unit:	566-291 LED Reg 2 - North Central Region											
Classification:	Fish and Game Lieutenant (Supervisor)											
Bargaining Unit:	S07 - S07											
Work Week Group:	2											
Organization Name	Data and Technology Division (DTD)											
Supervisor Name	Lau, Simon											
DOF	<input checked="" type="checkbox"/>											
End Date	<input type="text" value="mm/dd/yyyy"/>											
Temporary Reclass	<input type="checkbox"/>											
Position Tenure	Permanent											
Position Time Base	Full Time											
Bargaining Unit Override	-- Select One --											
Basic Information Correct?	<input checked="" type="radio"/> Yes <input type="radio"/> No											
Comments:*	<input type="text" value="Test"/>											
Approve	Send back to Originator											

Classification & Pay Tab

After the Position Control Approval, RPA will be sent to Classification & Pay Tab.

- If the DOF Memo is marked 'Yes', then Approve button is available and comment is not required
- If the DOF Memo is marked 'No', then Approve button will be disabled and RPA will be sent back to the originator by enabling the 'Send Back to Originator' button
 - Comment box will be mandatory

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF
Exit Clearance						
Last Incumbent Name	Pandey, Sapana					
Exit Clearance Link	Exit Clearance ID – 694					
Classification and Pay						
Basic Information Correct?	<input checked="" type="radio"/> Yes <input type="radio"/> No					
Supporting Document Correct?	<input checked="" type="checkbox"/> Advertisement <input checked="" type="checkbox"/> Duty Statement <input checked="" type="checkbox"/> Hiring Justification					
DOF Memo?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A					
Comments:	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>					
Approve	Send back to Originator					

Budget Tab

Your RPA submission has now been sent to Budgets for approval.

- If Operating Budget Adjustment (OBA) Form Correct AND Funding Change option is marked 'Yes', then Approve button will be enabled to proceed further
- If Operating Budget Adjustment (OBA) Form Correct AND Funding Change option is marked 'No', then comments are mandatory to enable the 'Send back to the originator' button.

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF	Advertisement	Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History
------------	-------------------	------------------	----------------------	---------------	---------------	-----	---------------	-------------------------	-------	-------------	--------------	--------	----------------------

Proposed Funding

	Project	Reporting Structure	Time Fraction	Commer
<input type="button" value="Delete"/> <input type="button" value="Edit"/>	38000000070100 – 700 SUPPORT SERVICES - ADMIN	380000910 – SP:R1 HAB MITIGTN ENHANCEMENT		1.0000

Documents

Name	FileName	File
No data available in table		

Budget

Operating Budget Adjustment(OBA) Form correct Yes No N/A

Funding Change? Yes No

Comments:

ERC Committee

Your RPA submission has now been sent to ERC Committee for approval

- If RPA is approved by the ERC Committee, then 'Approve' button will be enabled to proceed further
- If RPA is not approved, then comments are mandatory to enable the 'Send back to the originator' button.
- 'ERC Hold' button can be used to put a hold on RPA for further notice from the committee.

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF	Advertisement
Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History		

Executive Committee

ERC Comment*

Approved

Approve ERC Hold Send back to Originator

DOF Tab

- If the DOF checkbox is marked already, then provide
 - Std 607
 - Std 607 FY
 - Std 607 Reason
 - Effective Date
- Click Approve Button
- If not approved click Send back to originator
- This is a last stage where we can send the RPA back to originator
- On position Control, if DOF is not marked, then ERC will be the last stage to send it back to originator.

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF	Advertisement
Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History		

DOF

DOF

Std. 607 #*	<input type="text" value="ITSB006"/>
Std. 607 FY*	<input type="text" value="19/20"/>
Std. 607 Reason*	<input type="text" value="Reclass Position"/> ▼
Effective Date*	<input type="text" value="05 / 01 / 2020"/>

Comments*

Approved

Advertisement Tab

Your RPA submission has now been sent to advertisement for submission. Following mandatory fields must be filled for the RPA submission

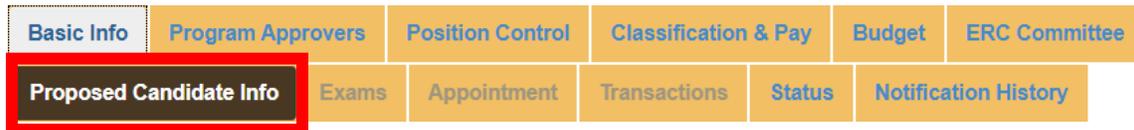
- Job Control Number
- Final Filing Date
- Advertisement Date
- Comments Box

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF	Advertisement
Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History		
Advertisement							
Job Control Number*	<input type="text" value="12345"/>						
Final Filing Date*	<input type="text" value="04/20/2020"/>						
Advertisement Date*	<input type="text" value="05/15/2020"/>						
Comments:*	<input type="text" value="Approved"/>						
Submit	Cancel						

Add Proposed Candidate Info

Your RPA submission has now been sent to the program approvers for review/approval. Once the RPA is approved by the program approvers, it will be sent to the Human Resources Branch (HRB) and Executive Review Committee (ERC) for approval. Once the RPA has been approved by HRB and ERC, you will receive an email notification that it has been approved. The email will include a link for you to add the proposed candidate information once a hiring decision is made.

Step 1 Click on the link in the email to go to the RPA and click on the “Proposed Candidate Info” tab.



Step 2 Fill out the fields in the “Proposed Candidate Info” tab and upload the candidate’s state application. Click the submit button when done to submit the candidate information to HRB for approval.

[image on next page]

Basic Info | Program Approvers | Position Control | Classification & Pay | Budget | ERC Committee | DOF | Advertisement | **Proposed Candidate Info** | Exams | Appointment | Transactions | Status | Notification History

Proposed Candidate Info

Employee Eligibility/MQ verified with HR? Yes No

Type of Employee Current Department Employee Former Department Employee New Employee

Position Number 565-030-1401-007

First Name*

Last Name*

Middle Name

Nick Name

Suffix

Proposed Start Date* mm / dd / yyyy

Work Phone Number* +1 (123) 456-7890 x 12345

Work Site*

Physical Address Mailing Address

Name	Required/Optional	Description	File
Application Form (Current)	required	PDF document STD 678 – On the candidate tab, please attach signed application when candidate is selected.	Browse...
Completed Interview Rating Sheets (Current)	required	PDF document - Fill in all required fields and upload completed documents for each rater at the time candidate is selected. *Please include rating sheets with rating scale for each interview question, panel member name, candidate name, date, and final score.	Browse...

Add other attachment

Submit Cancel

- User can change the Proposed start date to the date is greater than current date.
- User can also withdraw the proposed candidate information, and it will change the state to advertisement submitted. In this case user can submit the proposed candidate info again.

Cancel Change Proposed Start Date Withdraw

Additional Notes

Please note the following information when submitting an RPA:

- The RPA can be returned during any portion of the approval process. If the RPA is returned, the originator of the RPA will receive an email with the reason why it was returned. The originator can then correct the RPA and resubmit.
- If you have previously submitted an RPA through HRMS or if you exited in the middle of an RPA, you can return to it by visiting the [Workflows](#) then the “Request for Personnel Action (RPA) Dashboard” option:

Requests for Personnel Action

Request for Personnel Action (RPA) Dashboard	Request for Personnel Action (RPA)
View submitted Request for Personnel Action (RPA) records	Initiate an RPA

Exams Tab

Your RPA submission has now been sent to the Exams for review/approval.

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF	Advertisement	Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History
Proposed Candidate Info													
Proposed Candidate Name	Test 2, Test1												
Proposed Start Date	5/1/2020												
Exams													
Employee Eligibility/MQ Checked?	<input checked="" type="radio"/> Yes <input type="radio"/> No												
Is Completed Signed Application attached?	<input checked="" type="radio"/> Yes <input type="radio"/> No												
Method of Hiring	<input checked="" type="radio"/> Cert Process <input type="radio"/> Transfer <input type="radio"/> Reinstatement <input type="radio"/> T&D <input type="radio"/> Other												
Enter Cert Number*	222222 <input checked="" type="radio"/> Promo <input type="radio"/> Open												
Job Control Number	12345												
Approved Start Date*	05 / 01 / 2020												
Salary Information*	\$ 4500 <input type="text"/> Monthly <input type="text"/>												
Alternate Range	<input type="radio"/> Yes <input checked="" type="radio"/> No												
Hire Above Minimum	<input type="radio"/> Yes <input checked="" type="radio"/> No												
Red Circle Rate	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="text"/> Number of Days												
Name	Required/Optional	Description	File										
<input type="button" value="Add other attachment"/>													
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>													

Appointment Tab

Your RPA submission has now been sent to the Transactions for review/approval. This is the final stage, where the RPA information updates the HRMS application.

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee	DOF	Advertisement	Proposed Candidate Info	Exams	Appointment	Transactions	Status	Notification History
Proposed Candidate Info													
Proposed Candidate Name	Test 2, Test1												
Proposed Start Date	5/1/2020												
Appointment													
Position Number	565-030-1401-007												
Type of Employee	<input type="radio"/> Current Department Employee <input type="radio"/> Former Department Employee <input checked="" type="radio"/> New Employee												
Employee ID	(Not Assigned)												
Employee Name	Test 2, Test1												
Employee Nick Name													
Employee Start Date	05 / 01 / 2020												
Employee End Date	mm / dd / yyyy												
Appointment Tenure	Permanent												
Appointment Time Base	Full Time												
Comments													
<div style="border: 1px solid red; padding: 2px; display: inline-block;">Update HRMS</div>													

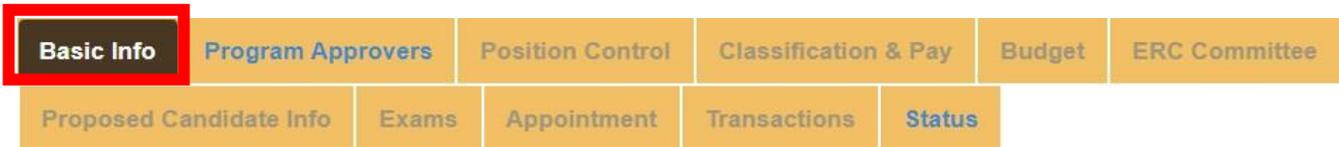
Transactions Tab

RPA process will be completed by entering employee SSN and SCO key-in date.

Transactions	
Employee Last Name	<input type="text" value="Test 2"/>
Employee First Name	<input type="text" value="Test1"/>
Employee Nick Name	<input type="text"/>
Employee Middle Name	<input type="text"/>
Suffix	<input type="text"/>
Employee Start Date	<input type="text" value="05 / 01 / 2020"/>
SSN	<input type="text" value="222-22-2222"/>
Keyed into the SCO Date	<input type="text" value="05 / 15 / 2020"/>
Comment	<input type="text"/>

Program Approvers: Review and Approve

- Step 1 As a Program approver, you will receive an email with a deep link taking you to a specific RPA to review/approve. Click on the link in the email to review/approve.
- Step 2 Review all the information and supporting documents on the “Basic Info” tab.



- Step 3 After reviewing the “Basic Info” tab, click on the “Program Approvers” tab. Indicate if the basic information and supporting documents are correct. Click the “Approve” button if correct. The RPA will then go to the Human Resources Branch and the Executive Review Committee for approval.

If the information is not correct, enter in comments on what needs to be updated and click the “Send back to Originator” button. The originator will receive an email with your comments and a link to update the RPA.

[image on next page]

Basic Info	Program Approvers	Position Control	Classification & Pay	Budget	ERC Committee
Proposed Candidate Info	Exams	Appointment	Transactions	Status	

Basic Information Correct? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Supporting Document Correct?	<input checked="" type="checkbox"/> Advertisement <input checked="" type="checkbox"/> Duty Statement <input checked="" type="checkbox"/> Hiring Justification
Comments: <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	
<input type="button" value="Approve"/> <input type="button" value="Send back to Originator"/>	