



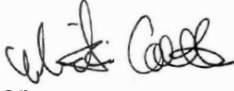
Gavin Newsom  
Mayor

Micki Callahan  
Human Resources Director

**M E M O R A N D U M**  
**DHR No. 11-2008**

**DATE:** November 5, 2008

**TO:** Department Heads/Personnel Officers  
Departmental Payroll and Personnel Clerks  
Department Chief Financial Officers

**FROM:** Micki Callahan   
Human Resources Director

**SUBJECT:** **New Requisition Review Procedures**

---

To address the City's current and projected budget shortfalls, the Department of Human Resources ("DHR") issued DHR Memorandum No. 10-2008, on October 29, 2008 which addressed the cancellation of open requisitions and the general requirements for approval of new requisitions. The purpose of this memorandum is to provide more detailed instructions regarding the submission of new requisitions, required supporting documentation, and the review process for new and pending requisitions. It should be noted that requisition approval will generally be granted only on a case-by-case basis.

**Cancellation of Requisitions in "Draft" Status as of October 30, 2008**

In order to ensure that PeopleSoft accurately reflects the requisition submission intent of departments, and to ensure that all active requisitions are properly reviewed by the Mayor's Budget Office, the Controller and the Department of Human Resources, DHR will be canceling all requisitions currently in "Draft" status that were drafted on or prior to October 30, 2008. Any requisitions in "Submit" status as of October 30 will not be cancelled. Departments should re-draft and re-submit only those requisitions for which it is seeking immediate approval.

**Requisition Submission Authority**

Effective immediately, all requisitions may only be submitted in PeopleSoft by a department's designated finance representative. Please note that the designated finance representative should be the department's chief financial officer or budget officer. Requests to add requisition submission authority for finance representatives who are current PeopleSoft users, or to add finance representative as new users, should be sent by email to [PSoft\\_Support@sfgov.org](mailto:PSoft_Support@sfgov.org). DHR will provide basic requisition submission training for new PeopleSoft users as necessary. Requests for training should also be sent by email to [PSoft\\_Support@sfgov.org](mailto:PSoft_Support@sfgov.org).

In certain departments, it may be operationally impracticable for the finance representative to submit requisitions. In those approved instances, the individual currently authorized to submit requisitions may continue; **however**, your department's finance representative must submit a detailed spreadsheet listing those requisitions (in priority order) that have been reviewed and

approved. The spreadsheet should be sent by email directly to the Mayor's Budget Analyst assigned to your department.

### **Required Documentation**

As stated in DHR Memorandum No. 10-2008, departments are now required to complete and submit documentation supporting the job class requested and justifying the need to fill the position. The required documents include the following:

1. A unit-level organizational chart clearly identifying the requested position and its relationship to positions above and below it. The chart must include the job code for each position shown.
2. An organization-wide organizational chart clearly identifying the requested position and its relationship to similar positions across the organization. The chart may be supplemented by a narrative describing how similar positions are used across the department, and why the work of the position being requested cannot be undertaken by other existing positions in the organization.
3. A detailed position description including the duties to be performed by the requested position. It is suggested that departments use an Express Classification Form to transmit this information, or that this information be posted directly to the "Express Classification" notepad in PeopleSoft. In certain circumstances, a Job Analysis Questionnaire (JAQ) may be required. Documentation previously submitted during budget preparation may be resubmitted provided that the documentation accurately reflects the duties of the particular position the department is requesting. Generic position descriptions copied from the official class specifications, although often sufficient for budget classification approval, may not be sufficiently job-specific for requisition review purposes.
4. Any other relevant justification for position approval including: spending plans, overtime analysis, or mandatory staffing requirements.

### **Requisition Review Process**

All documentation should be transmitted electronically by email attachment to your department's assigned Mayor's Budget Analyst and DHR Client Services Analyst. Documentation should be submitted as soon as the requisition for the requested position has been submitted in PeopleSoft, and should clearly reference the DHR requisition number and job code of the position(s) for which you are seeking approval.

Documentation will be reviewed with particular attention to the following questions:

1. Is the level of the position appropriately justified by the documentation submitted; and
2. Is the need for the requested position appropriately justified by the documentation submitted.

Requisitions will not move forward through the approval process until all required documentation has been submitted.

**Resubmission of Rejected Requisitions**

If a requisition is rejected by the Mayor's Chief of Staff, the Mayor's Budget Director and the Human Resources Director, the department may be advised to resubmit the requisition in a different job class. In order to expedite review and approval when such resubmission is authorized, the department must include the DHR requisition number of the rejected requisition in the "Replaces Req #" field on the "Conditions" tab of the resubmitted requisition. Additionally, the department must ensure that the position description is amended to appropriately reflect any changes in the scope or level of the job class.

Please continue to perform regular audits of approved and available requisitions in the PeopleSoft system to ensure that hiring intentions are accurately reflected. PeopleSoft queries (REQ\_OPEN\_ONE\_DEPT and REQ\_BY\_STATUS\_1\_DEPT) are available for you to determine which requisitions are being rejected, and to further audit your approval and available requisitions.

Should you have any questions regarding the contents of the memorandum, please consult with your assigned DHR Client Services Representative. Thank you for your cooperation and understanding.