SUBJECT: Personnel Requisition and Transaction Approval

1. Purpose. To establish policies and procedures for signed approval of Requisition and Transaction forms involving personnel hiring and status changes.


3. Application. This Administrative Regulation shall apply to all departments and employees of the City of Huntington Beach.

4. Definitions.

4.1 Personnel Requisition. (See Attachment A) This is a two part form: The first part is to request authorization to hire an employee into a specific classification. The second part designates the individual hired, the rate of pay and provides for approval of appointment.

4.2 Personnel Transaction. (See Attachment B) This is a multi-purpose form whereby the department requests authorization to change the status of a current employee. This includes changes such as promotions, step increases, transfers, leaves of absence, terminations, range adjustments, changes to a new classification, two step increases and disciplinary action.

5. Policy. The Personnel Requisition and Transaction shall have all signatures indicated on the forms prior to the implementation of the proposed action.

6. Responsibilities.

6.1 Department. The department initiating the Personnel Requisition or Transaction shall be responsible for indicating whether or not the proposed action is within the approved budget. The department shall be responsible for providing reasons and justifications for the proposed personnel actions and assure that these actions are in compliance with any applicable Personnel Rules or any other applicable directives.

If the Personnel Transaction involves a departmental transfer, it will also require the authorization of the receiving department.

6.2 Personnel. Personnel shall evaluate the appropriateness of any proposed action to assure that it is consistent with the classification system and in compliance with wage and salary practices.
Personnel shall also assure that proposed action is within budgeted allocations.

6.3 Finance. Chief of Administrative Services or his designee shall determine if funding is available for proposed action.

6.4 Administration. Administration shall be responsible for authorizing any changes to the budget and has the final authority for approving any proposed actions. Administration shall be responsible for determining if a proposed action requires Council action and preparing the Request for Council Action.

7. Procedure.

7.1 The requesting department will initiate the Personnel Requisition or Transaction and the department head or a designee shall sign and date signature. Personnel Transaction involving step increases shall be accompanied by a completed Performance Evaluation. (See Attachment C) Any other pertinent documents shall be attached to the Personnel Transaction such as letters of resignation, doctor's return to work approvals, memos explaining and recommending proposed actions and other related documents.

The originating department will keep the goldenrod copy which serves as a worksheet and reference copy until an approved copy comes back. In case of a departmental transfer, the originating department shall next send the Transaction to the proposed receiving department for a dated signature. After this step or before it, if it is not a transfer, the form shall be submitted, in order, to the Personnel Director, Chief of Administrative Services Department and City Administrator for their approval by dated signatures.

When an individual is hired on an approved Requisition, the necessary information shall be entered on the lower appointment portion of the form for approval by the Personnel Director.

When all signatures have been affixed to the form, it shall be separated by the Personnel Division and copies distributed in the following manner:

- White copy - Kept by Personnel Division
- Green copy - Sent to Finance Division
- Yellow copy - Sent to originating department
- Pink copy - Sent to originating department for distribution to the employee
- Goldenrod copy - Originating work copy prior to signature being affixed to form

City Administrator

City Of Huntington Beach

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