



EXCEPTIONAL ALLOCATION (STD. 625) DOCUMENT CHECKLIST

All forms, organization charts, and justification memos must be signed.

Process A	Process B	Process C
Use of Department-Specific Classification Belonging to Another Department	Exceptional Use of Classification	Use of Formerly Restricted Classification
When Dept. A wants to use Dept. B's department-only classification	When a department wants to use a classification in a way that does not meet allocation standards or varies from traditional use described in classification specifications	<p>When a department wants to use a classification formerly restricted by PML 2007-026</p> <p>When a department wants to use a classification formerly restricted by MCR 0</p> <p>Formerly Restricted Classifications: Data Processing Manager IV, Attorney IV, Labor Relations Specialist, Labor Relations Manager I, Labor Relations Manager II, Staff Services Manager I (Specialist)*, Staff Services Manager II (Specialist)*, and Information Technology Specialist III.</p>
Send package for CalHR approval	Retain package and internal records for audit purposes	Retain package and internal records for audit purposes
<ul style="list-style-type: none"> <input type="checkbox"/> STD. 625 form <input type="checkbox"/> Current duty statement <input type="checkbox"/> Proposed duty statement <input type="checkbox"/> Current organizational chart <input type="checkbox"/> Proposed organizational chart <input type="checkbox"/> Memorandum of justification <input type="checkbox"/> Dept. B approval for use of classification 	<ul style="list-style-type: none"> <input type="checkbox"/> STD. 625 form <input type="checkbox"/> Request for Personnel Action (RPA) form <input type="checkbox"/> Current duty statement <input type="checkbox"/> Proposed duty statement <input type="checkbox"/> Current organizational chart <input type="checkbox"/> Proposed organizational chart <input type="checkbox"/> Memorandum of justification <input type="checkbox"/> Copy of signed and dated Exceptional Allocation Delegation Agreement (recommended) 	<ul style="list-style-type: none"> <input type="checkbox"/> No STD. 625 form required for standard allocations <input type="checkbox"/> Request for Personnel Action (RPA) form <input type="checkbox"/> Current duty statement <input type="checkbox"/> Proposed duty statement <input type="checkbox"/> Current organizational chart <input type="checkbox"/> Proposed organizational chart <input type="checkbox"/> Memorandum of justification <p>*SSMI (Specialist) and SSMII (Specialist) require STD. 625 form and follow Process B</p>