## EXCEPTIONAL ALLOCATION (STD. 625) DOCUMENT CHECKLIST

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

<table>
<thead>
<tr>
<th>Process A</th>
<th>Process B</th>
<th>Process C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of Department-Specific Classification Belonging to Another Department</td>
<td>Exceptional Use of Classification</td>
<td>Use of Formerly Restricted Classification</td>
</tr>
<tr>
<td>When Dept. A wants to use Dept. B’s department-only classification</td>
<td>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</td>
<td>When a department wants to use a classification formerly restricted by PML 2007-026</td>
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<tr>
<td></td>
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<td>When a department wants to use a classification formerly restricted by MCR 0</td>
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<td>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)<em>, Staff Services Manager II (Specialist)</em>, and Information Technology Specialist III.</td>
</tr>
</tbody>
</table>

### Send package for CalHR approval
- STD. 625 form
- Current duty statement
- Proposed duty statement
- Current organizational chart
- Proposed organizational chart
- Memorandum of justification
- Dept. B approval for use of classification

### Retain package and internal records for audit purposes
- STD. 625 form
- Request for Personnel Action (RPA) form
- Current duty statement
- Proposed duty statement
- Current organizational chart
- Proposed organizational chart
- Memorandum of justification
- Copy of signed and dated Exceptional Allocation Delegation Agreement (recommended)

### Retain package and internal records for audit purposes
- No STD. 625 form required for standard allocations
- Request for Personnel Action (RPA) form
- Current duty statement
- Proposed duty statement
- Current organizational chart
- Proposed organizational chart
- Memorandum of justification

*SSMI (Specialist) and SSMII (Specialist) require STD. 625 form and follow Process B