

OHRM Reorganization Checklist

This reorganization checklist details the requirements outlined in Human Resources (HR) Bulletin #252, FY21, [Reorganization Requests](#), along with best practices at the Department. This is **not** a comprehensive list of all activities related to a reorganization, rather it is a tool to assist in the submission of a complete package for OHRM approval. Reorganization package responses are reviewed and prepared by the Office of Policy and Benefits, Office of Human Resources Management (OHRM).

Prepare Reorganization Package

Bureaus and Operating Units (OU) that are reprogramming funds for certain purposes must notify Congress by submitting a Notification of Proposed Changes (i.e., 505) to the Hill. If notification is not required that must be stated in the request.

- ☐ Congressional Notification Statement or Approval if Required

Bureaus/OUs must draft justification memorandum with reason/business case, description of structural changes, impact on employees, improvement/efficiency that will result, and impact on the existing Department Organizational Order (DOO). Justification memorandums are best when all organizational codes that are being established, renamed, and/or abolished are identified upfront. Requests for new organizational codes may be included in the justification or provided in a corresponding email to the Department. Before and after organizational charts must be submitted to demonstrate the requested change.

- ☐ Draft Justification Memo
- ☐ Generate or Request New Organizational Codes and Identify Codes Being Abolished or Eliminated
- ☐ Create Before/After Organizational Charts

The bureau/OU must work with their Servicing Human Resources Office (SHRO) on updating/revising/creating new Position Descriptions (PDs), if applicable, adhering to the designated classification authority for the position(s). Updated PDs do not need to be included in the reorganization request; however, please note that the positions have been reviewed.

- ☐ PD Review

Create a crosswalk (e.g. in Excel) to address organizational changes and meet processing requirements. All positions changing organizational structure must be listed in the crosswalk.

- ☐ Create Crosswalk/Processing Chart
 - Name, Title, Occupational Series, Grade/Band, Full Performance Level, Supervisory Status, Bargaining Unit Status, and if any of these are changing
 - Current Organizational Code, Current Organizational Title
 - Employee ID, New Organizational Code, New POI, Reports to Position Number*

*Requirements of Enterprise Services for processing.

The bureau/OU must update any DOOs and/or Department Administrative Orders (DAOs) if they are impacted and include a copy in the request. If the updated DOO and/or DAO is not completed, the request needs to provide a status/approximate date of implementation. Reorganizations that require Congressional approval must receive Congressional approval first before the DOO and/or DAO can be updated. Please note if there is no impact on the DOO or a DAO in your request.

☐ DOO Review

SES Position Preparation (if applicable)

If SES, SL, and ST positions are impacted, the bureau/OU must work with their SHRO on updating/revising/creating new SES, SL, or ST positions as a result of the reorganization. The updated PDs does not need to be included in the reorganization request; however, the request should explain the status of the updated PDs (i.e., working with the SHRO on drafting; currently in the approval process; or approved). Bureaus must update PDs and assemble position packages, if applicable, to the Office of Executive Resources at ExecutiveResources@doc.gov.

☐ Update SES PDs

- New PDs
 - Major Duties
 - Professional Technical Qualifications (PTQs) (3 are required and they denote what is needed to be successful)
 - Cover Sheet
 - Position Sensitivity Tool
 - Qualification Standards

☐ Assemble SES Position Package

- Justification
- Old PDs
- New PDs
- Org Chart
- CD-79 Security Clearance Paperwork

The Office of Executive Resources works with the Chief Financial Officer and Assistant Secretary for Administration (CFO/ASA) to review and approve changes.

☐ SES Changes Reviewed/Approved

OHRM Review and Approval

The Office of Budget provides a review and confirms congressional notification status to OHRM.

☐ Budget Review

OHRM reviews all materials including justification, organizational charts, crosswalks, etc. and provides response memo to the bureau/OU from the Chief Human Capital Officer/OHRM Director. Requests should be sent to OPBServices@doc.gov.

☐ OHRM Response

Post-OHRM Approval Action

Bureau/OU will need to work with their servicing HR provider (e.g. Enterprise Services), the Office of Privacy and Open Government if DOO updates are needed, the GovTA manager to ensure flow to the system if necessary, and the Office of Financial Management to establish codes used in OFM and a CAPS Pay Pool if necessary.

Bureau/OU to work with servicing HR provider (e.g. Enterprise Services) on establishing codes. Allow time for processing, and update DOO if needed.

- ☐ Establish Organizational Codes in NFC
- ☐ (ES) Processing (takes up to 6 weeks)
- ☐ Abolish Organizational Codes in NFC
- ☐ Update DOO (if needed)

Bureau/OU to work with GovTA manager on creating new organizations in GovTA.

☐ GovTA Migration

Bureau/OU to work with the Office of Financial Management in establishing new CAPS pay pools.

☐ Establish CAPS Pay Pool (if needed)