Alameda County Health Care Services Agency

Personnel Requisition

How to Complete the DocuSign E-Form

Mission Statement:
To provide fully integrated health care services through a comprehensive network of public and private partnerships that ensure optimal health and well-being and respect the diversity of all residents.

Created by:
ACBH
Information Systems
October 22, 2021
Version 1.5

Quick Reference Guide

Use the instructions below as a quick guide. For more detailed instructions refer to the following pages.

Role: Immediate Supervisor or designee

1. From a device on the county network, open internet browser and navigate to the HCSA intranet site http://achcsa.org/hcsa/ .
2. From the main page click on the Forms tab to go to http://achcsa.org/hcsa/forms.aspx or navigate to Human Resources | Policies and Forms | Personnel Forms http://achcsa.org/human-resources/policies-forms.aspx .
3. Select the Personnel Requisition form.
4. A web form will open. Complete the introductory set-up questions and click *Submit*.
5. Open Outlook and find the email from DocuSign in the Inbox.
6. Open the email and click on *View Documents* (to fill out the Personnel Requisition form).
7. (If prompted, check the box for "I consent to use Electronic Records and Signatures") and click on *Review Document*.
8. Fill in the required fields outlined in red. Fields outlined in gray are optional. Add an attachment if required.
9. Click on the "Sign Here" sticky note image. Select a signature style (or create your own from a touch-screen device).
10. Complete any required fields in the section for Immediate Supervisor.
11. Click on the yellow "Confirm Signing" tab.
12. Close the DocuSign window.

Role: Signer

1. When an email from DocuSign with the heading "Please review and sign your document" comes to your Outlook Inbox, click on *View Documents*.
2. A "Request for Signature" window will open. (If prompted, check the box for "I consent to use Electronic Records and Signatures") and click *Review Document*.
3. To progress through the form fields, either click the yellow "Next" tab to go field by field, or simply click in a field to position your cursor. Data may be changed or entered.
4. Once the information is all satisfactory, scroll to the second page and locate the section for your role (Division Director, Finance Department, Department Head or Agency Director).
5. Click the radio button for "Approved" or the "Decline" button. Indicate whether you are the Signer or a Designee.
6. Click on the yellow "Sign Here" sticky note image. Select a signature style (or create your own from a touch-screen device).
7. Click on the yellow "Confirm Signing" tab.
8. Close the DocuSign window.

NOTES:
- If you have questions about the information on the form or about names to use for the subsequent roles, contact your DPO or your Manager. For problems or issues with the DocuSign process contact HIS@acgov.org or 510-567-8181 (tie line x38181).
- You can download the completed form from DocuSign and save it as a PDF document.
- The Immediate Supervisor or designee will receive a "Carbon Copy" email after each signature is applied, or if the form is denied by one of the signers.
- All signers will receive a "Completed" email after Human Resources receives and opens the completed document.

Personnel Requisition E-Form

This document indicates the process for completing the Human Resources Personnel Requisition (PREQ) form and workflow. The PREQ has been automated to support both electronic signature capture and automated routing of the form. This automated routing and signature capture will ensure the forms are received and processed in the shortest amount of time. The updated form is used by all departments within the HCSA Agency (Agency Admin, ACHB, EH, PH).

DocuSign E-Signature

The PREQ uses a signature and routing engine developed by DocuSign. DocuSign is the leading provider of secure electronic signatures and transaction workflows for the banking, real estate and health care industry. DocuSign supports the ESIGN act of 2000 which established the legality of Electronic Signatures in the United States. Note: Using the DocuSign process, documents **do not** need to be printed and physically signed.

Routing / Email Follow-up

The form will automatically be routed to the next person in-line responsible for approving the Requisition based on what the Immediate Supervisor/initiator entered on the first screen. Each time a person approves the form, the initiator will receive a "carbon copy" of the approval email for their records. If any of the signers "decline" a requisition, the initiator will be notified and the form is closed. After HR receives and views the form all signers will receive a "completed" notification.

Email Routing Sequence
a. Immediate Supervisor / Initiator (Form creator)
b. Division Director (approval and signature)
c. Finance Department (approval and signature)
d. Department Head (approval and signature)
e. Agency Director (approval and signature)
f. Human Resources (processing)

Email Follow-Up
If the recipient of the email has not approved or denied the Personnel Requisition form within two (2) days, a follow-up email will be sent as a reminder. Reminders will be sent every 48 hours until the form is processed.

Automatic Void
The PREQ will automatically be voided from the DocuSign system if the PREQ has not been completed after 6 months.

Accessing the Personnel Requisition Form

The PREQ is accessed via the HCSA intranet site: Home Page | Forms or Human Resources | Policies & Forms. Open a browser and navigate to the Personnel Requisition form.

HCSA Home - Forms Page

Human Resources – Policies & Forms page

Personnel Requisition – Immediate Supervisor/Initiator

As with the paper version of the Personnel Requisition, the Immediate Supervisor or their designee is the person that will be completing the various fields of the PREQ.

Starting the Personnel Requisition

1. Select the Personnel Requisition link from the HCSA or Human Resources forms page.
2. A web form will open in order to enter information.
3. Indicate the Job Title and Position Number for the PREQ.

Note: The <u>Job Title</u> and <u>Position Number</u> are used as the Subject for the email description.

4. If you are the Immediate Supervisor for the position, go to the ***<u>Supervisor – Yes</u>*** Section.
5. If you are <u>not</u> the Immediate Supervisor for the position, go to the ***<u>Supervisor – No</u>*** Section.

Supervisor - Yes:

6. Indicate **Yes** for the question, "Are you the Immediate Supervisor". **Note: This individual will receive an email from the DocuSign system to complete the various PREQ fields.**
7. Select your role as either the Immediate Supervisor, Division Director or Finance Director from the menu list. **Note: If you select Division Director for instance, the PREQ will not prompt for the Immediate Supervisor position.**
8. Select your Department Name from the menu list.
9. Select your name as either the Immediate Supervisor, Division Director or Finance Director based on the role you selected previously.
10. Select the name of your Division Director from the menu list.
11. The names of the Finance Director, Department Head and Agency Director are automatically entered based on the Department you selected.
12. Click on "**Submit**" button when complete.
13. The person indicated as the Immediate Supervisor will receive an email from the DocuSign system to fill-out the PREQ form.
14. Once completed, the form will be routed sequentially in order to each signers/approvers indicated.

Supervisor - No:

6. Indicate **No** for the question, "Are you the Immediate Supervisor".
7. Indicate your Name and your Email address into the two open fields. **Note: This individual will receive an email from the DocuSign system to complete the various PREQ fields.**
8. Select your Department Name from the menu list.
9. Select the name of the Immediate Supervisor from the menu list.
10. Select the name of the Division Director from the menu list.
11. The names of the Finance Director, Department Head and Agency Director are automatically entered based on the Department you selected.
12. Click **Submit** when complete.
13. The person indicated as the Immediate Supervisor designee will receive an email from the DocuSign system to compete the PREQ fields.
14. Once completed, the form will be routed sequentially in order to each signers/approvers indicated.

15. An email will be sent to either the Immediate Supervisor or the Designee indicated in the prior two sections.
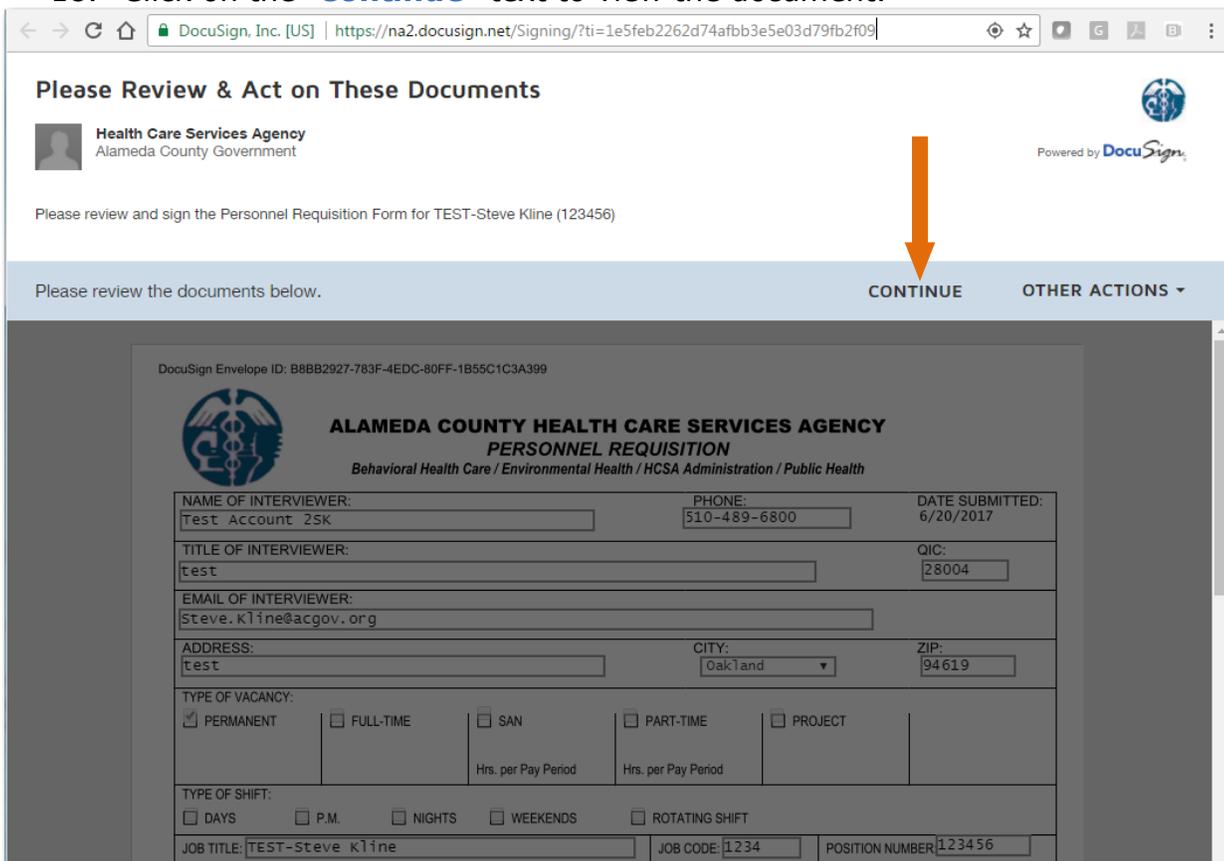
16. Open the Email sent from DocuSign (**Health Care Services Agency via DocuSign**).

17. Click on the "*View Documents*" link in the Email to open the online PREQ form.

18. Click on the "*Continue*" text to view the document.

19. Complete ALL required fields outlined in red. Fields outlined in gray are optional.

NAME OF INTERVIEWER:		PHONE:		DATE SUBMITTED:
Test Account 2SK				7/20/2017
TITLE OF INTERVIEWER:				QIC:
EMAIL OF INTERVIEWER:				
Steve.Kline@acgov.org				
ADDRESS:		CITY:		ZIP:
		-- select -- ▼		

20. If there any documents that need to be attached to the PREQ, check the "Is there any document to be attached box" at the bottom of page 1 and follow the online instructions. ***NOTE: The attachment feature is only available for the initiator and the next person in workflow.***

> NOTE: Positions **MUST** be posted for one week on the HCSA Employment Opportunities listing prior to making a job offer.
>
> Is there any document to be attached?   ◉ Yes   ◯ No   **Attach** ⬇ 📎
>
> Page 1 of 2   FORM 301-QD-10 (REV. 10/12) (g Drive)

Add your Attachment   ✕

🖇 Would you like to upload or fax your attachment?

Send by fax	Upload your attachment
	Choose File No file chosen

21. **Saving your work.** In the event you need to Finish Later, select the "***Other Actions***" menu and select "Finish Later". This option lets you to exit the signing process, while saving the information you have entered (signatures and initials are not saved). You can return to the document to finish signing later by using the link in the email you originally received from DocuSign.

FINISH   OTHER ACTIONS ▾

| Finish Later |
| Print & Sign |
| Assign to Someone Else |
| Decline to Sign |

22. Once all the required fields have been populated, click on the "**Sign Here**" sticky note image. Select your signature style (or create your own from a touch screen device). *Note: Using the DocuSign process, documents do not need to be printed and physically signed.*

23. After signing and approving the PREQ, select the "**FINISH**" button to close the DocuSign window.

24. The system will display a "Log in to DocuSign" window which can be closed.
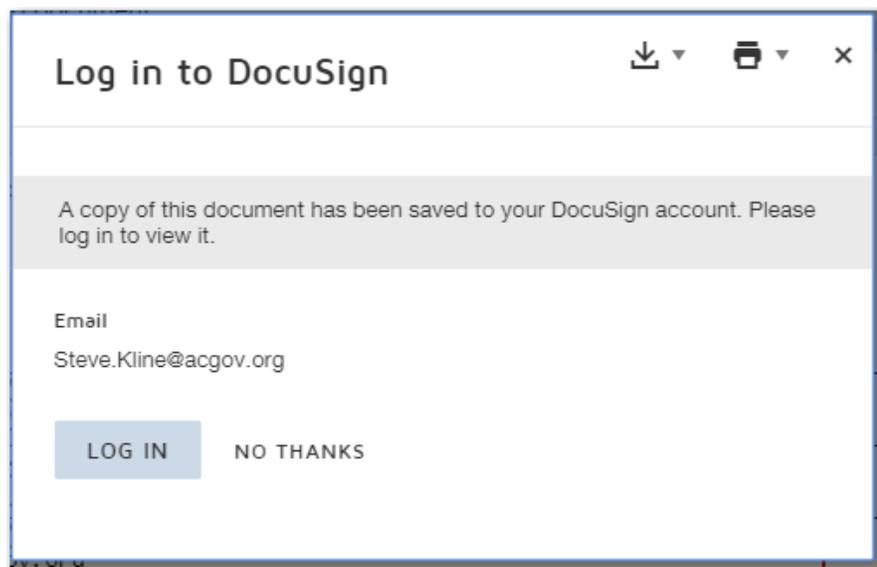
25. The form will automatically be routed to the next person for approval and signature.

Normal Email Routing Sequence
   a. Immediate Supervisor / Initiator (Form creator)
   b. Division Director (approval and signature)
   c. Finance Department (approval and signature)
   d. Department Head (approval and signature)
   e. Agency Director (approval and signature)
   f. Human Resources (processing)

DocuSign Process for Reviewing & Signing

Step 1 – Open Email sent from DocuSign (*Health Care Services Agency via DocuSign*).

Step 2 – Click on the "*View Documents*" link in the Email to open the online PREQ form.
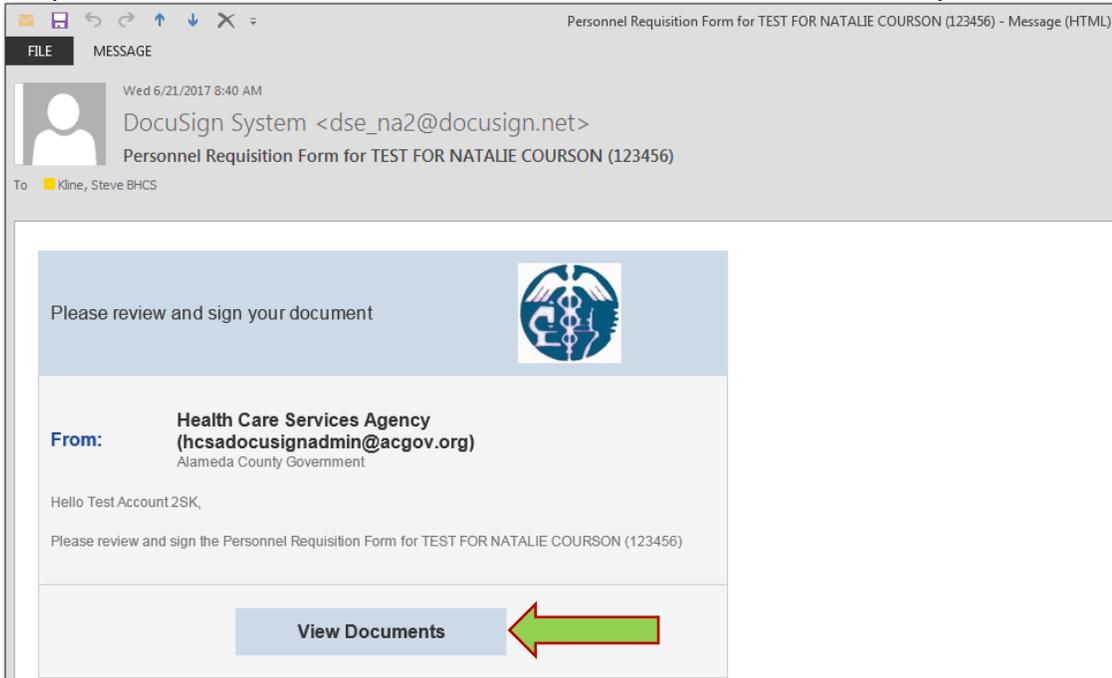
Step 3 – Click on the "*Continue*" text to view the document.
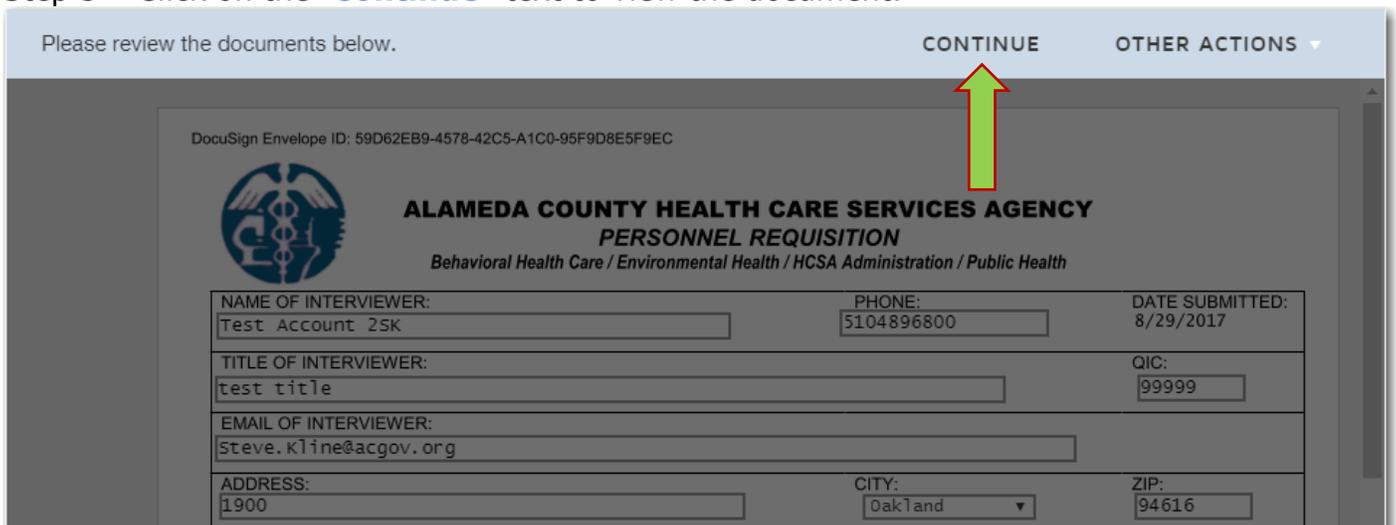
Step 4 – Use the scroll bar to scroll up / down the two page PREQ to review the document, or, click on the "*Start*" button to take you directly to where the signee needs to sign the document (or take action).
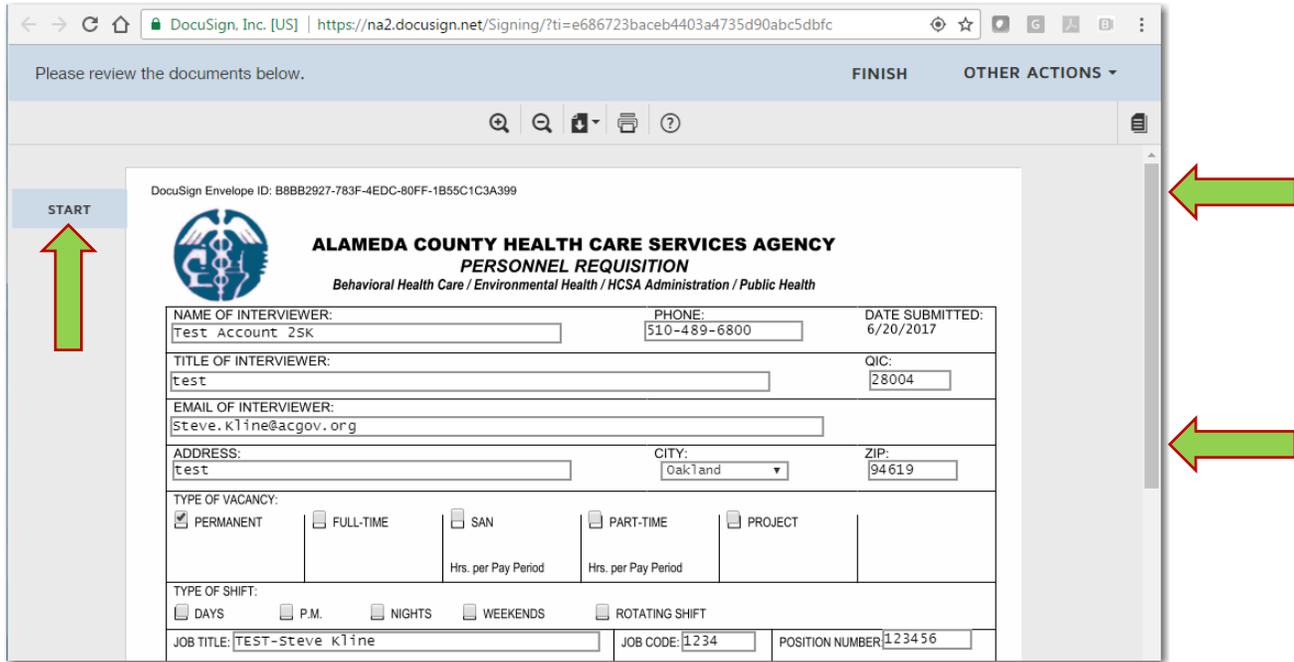
Step 5 – After reviewing the document, click the radio button for "Approved" or the "Decline" button. Indicate whether you are the Signer or a Designee. Click on the "*Sign Here*" icon to digitally sign the document.
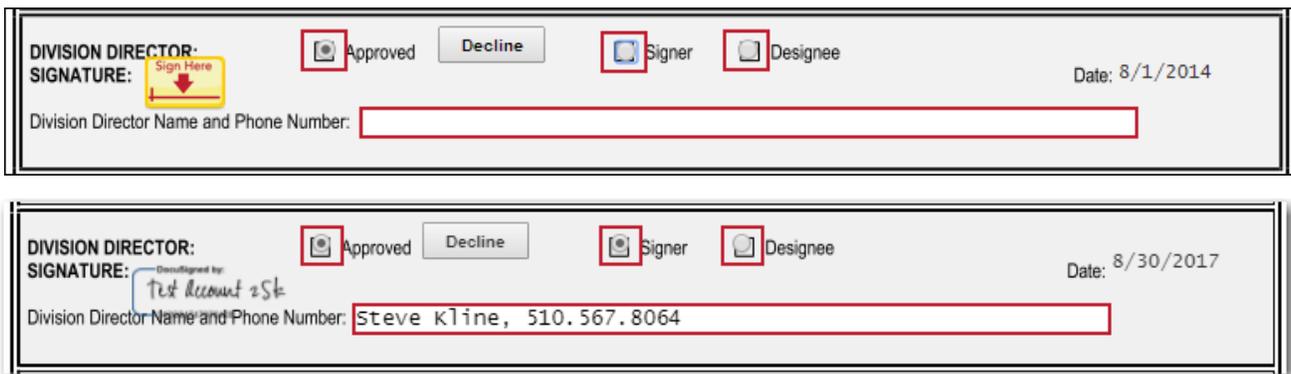
Step 6 – Click on the "*Finish*" button to complete the PREQ signing process. (Also refer to "*Other Actions*".)
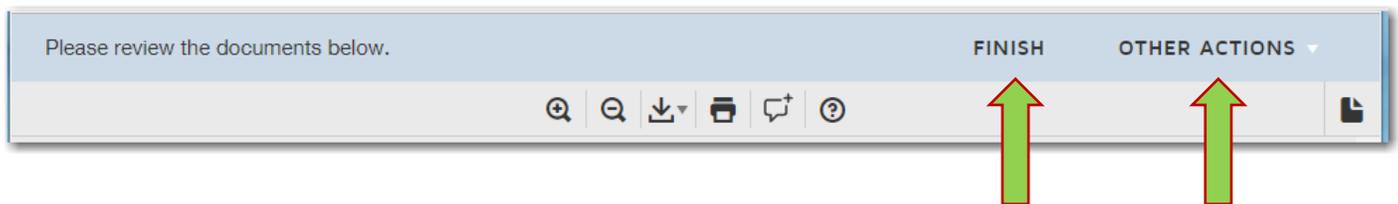
Other Actions:
Clicking "*Other Actions*" shows additional options available to you.
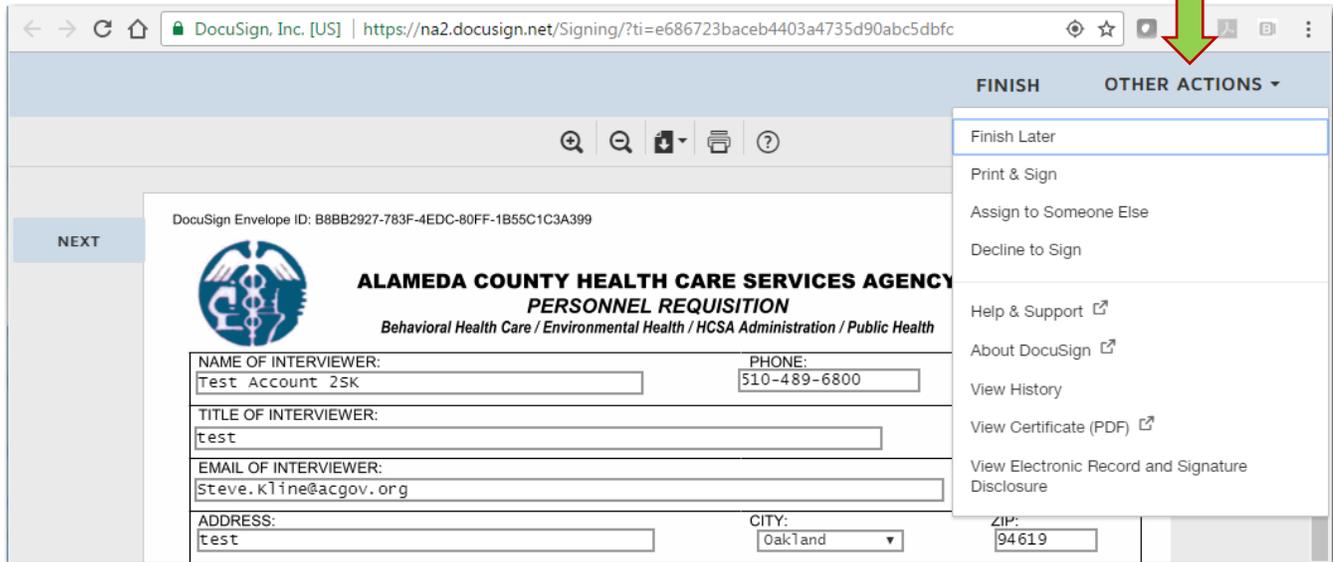
- **Finish Later:** This option lets you exit the signing process, while saving the information you have entered (signatures and initials are not saved). You can return to the document to finish signing later by using the link in the email you originally received from DocuSign.

- **Print & Sign:** This option lets you print and sign the document on paper. However, you must then scan the signed document and upload the signed document back to DocuSign. (ACBH *does not recommend using this option*).

- **Assign to Someone Else:** This option can be used to send the document to another person when they should be the signer. You will be asked to provide the new signer's name, email address and a reason for changing the signer. The reason for changing the signer is sent to person that sent the document, along with the new signer's name and email.

- **Decline to Sign:** This option lets you decline to sign the document. You will be asked to provide a message for the person that sent the document telling them why you have declined to sign.

- **Help & Support:** This link takes you to the online DocuSign Support page.

- **About DocuSign:** This link takes you to the online DocuSign Facts page.

- **View History:** This option shows the sending and signing history for the documents.

- **View Certificate:** This option opens a new browser window with a PDF version of the certificate of completion, which includes information about the events, and the disclosure. The PDF can be saved or printed.

- **View Electronic Record and Signature Disclosure:** This option shows the sender's Electronic Record and Signature Disclosure.

Frequently Asked Questions

Question	Answer
Do I need to print the form to sign it	Using the DocuSign process, documents do not need to be printed and physically signed.
Who can attach additional forms to the P-Req	Only the initiator can attach forms to the P-Req.
As a signer, will I get a copy of the form	A carbon copy of the PREQ form will be sent to all signers upon completion of the form.
Who can track the PREQ form	Only the initiator of the form can track their own forms, you cannot track a PREQ form that you did not create.
Can more than one email address be put into the Immediate supervisor address field	Only one email address is supported.
As the initiator, can I save the form without having to approve it	From the Other Actions menu, select Finish Later to Save your work.
Is there a way to HOLD the form or Set Aside so that it can be completed at a later date.	From the Other Actions menu, select Finish Later to Save your work.

Personnel Requisition – Human Resources

After the Agency Director (or designee) signs the form, Human Resources (group mailbox HCSAeForms) will receive a "Certified Delivery" email with a link to the completed document.

After HR opens the form by clicking on "View Documents", all signers will receive a "Completed" email with a PDF copy of the completed form and a summary of the signing events.

Personnel Requisition – Help

- For assistance with information or names on the form, contact your DPO or Manager.
- For problems or issues with the DocuSign process contact HIS@acgov.org or 510-567-8181 (tie line x38181).

Personnel Requisition Form

ALAMEDA COUNTY HEALTH CARE SERVICES AGENCY

PERSONNEL REQUISITION

Behavioral Health Care / Environmental Health / HCSA Administration / Public Health

NAME OF INTERVIEWER: Steve Office		PHONE:	DATE SUBMITTED:
TITLE OF INTERVIEWER:			QIC:
EMAIL OF INTERVIEWER: Steve.Kline@acgov.org			
ADDRESS:		CITY:	ZIP:

TYPE OF VACANCY:

☐ PERMANENT	☐ FULL-TIME	☐ SAN Hrs. per Pay Period	☐ PART-TIME Hrs. per Pay Period	☐ PROJECT	

TYPE OF SHIFT:

☐ DAYS   ☐ P.M.   ☐ NIGHTS   ☐ WEEKENDS   ☐ ROTATING SHIFT

JOB TITLE:	JOB CODE:	POSITION NUMBER:

SPECIALTY DESIGNATION (if applicable):		

PREVIOUS INCUMBENT:	FINANCE ORG:	HC LOCATION:

WORK ADDRESS & FLOOR: CITY & ZIP CODE:	IMMEDIATE SUPERVISOR: EMPLOYEE ID:

REQUEST FOR ELIGIBLE LIST TO FILL VACANT POSITION (Please complete if applicable)	
CERTIFY THROUGH (NAME):	POST ON REINSTATEMENT/TRANSFER WEBSITE:

ADDITIONAL COMMENTS:

EMPLOYEE INFORMATION – APPOINTMENT OF RETIREE, TRAINEE OR CONSULTANT (Please complete if applicable)	
EMPLOYEE NAME:	EMPLOYEE ID:

ADDITIONAL INFORMATION (Required Fields)
Does this position impact Client Services?
Does this position provide Administrative Support?
Does this position generate revenue?
Is this position a service mandate?
Other factors?
What is the value added to the Department by filling this position?

NOTE: Positions **MUST** be posted for one week on the HCSA Employment Opportunities listing prior to making a job offer.

IMMEDIATE SUPERVISOR SIGNATURE:	☐ Signer ☐ Designee	Date:
Supervisor Name and Phone Number:		

DIVISION DIRECTOR: SIGNATURE:	☐ Approved	☐ Signer ☐ Designee	Date:
Division Director Name and Phone Number:			

FINANCE DEPARTMENT: SIGNATURE: ☐ Approved   ☐ Signer   ☐ Designee   Date:

Finance Department Name and Phone Number:

Stable Funding Source for Program?   ☐ Yes   ☐ No   Funding Source:

FTE: Funding Source Time-Limited: ☐ Yes   ☐ No   Timeframe (if yes):

HR DEPARTMENT:	FINANCIAL ORG:	PROGRAM NUMBER / PROJECT:	COMMENTS:

DEPARTMENT HEAD: SIGNATURE:	☐ Approved	☐ Signer ☐ Designee	Date:

AGENCY DIRECTOR: SIGNATURE:	☐ Approved	☐ Signer ☐ Designee	Date:

HUMAN RESOURCE OFFICE USE ONLY

DATE RECEIVED:	INITIALS:	DATE ASSIGNED TO PROCESSOR:	ASSIGNED TO:

TYPE OF APPOINTMENT:

☐ REGULAR   ☐ VOLUNTARY DEMOTION   ☐ REINSTATEMENT   ☐ TRANSFER   ☐ PROVISIONAL   ☐ UNCLASSIFIED

T/K LOCATION:	SSTE LOCATION:	DATE CLOSED:	INITIALS:

Personnel Requisition Process Overview

Certification List / Provisional

Action	Responsibility
1. Contacts designated Personnel Officer to discuss the department's needs and determine the best method to fill a position (County Position, TAP, and/or Payroll Services).	Hiring Manager or Program Administrator/ Director
2. Submits the completed Personnel Requisition with Hiring Manager and Division Director signatures to Finance for approval.	Hiring Manager or Designee
3. Reviews requisition, confirms position number, and verifies pay units are available to fill the position; identifies expensing information for the position (org number and program number). Forwards approved requisitions as outlined below in item 4; denied requisitions will be returned to the Hiring Manager or Program Administrator/Director with explanation for denial.	Finance Department

4. The requisition is routed as follows and is reviewed and approved within two (2) business days at each level.
    a. Department Head*
    b. Agency Director
*The Department Head or their designee will be directly responsible for forwarding the signed personnel requisition to the Agency Director for approval.
	Department Head Agency Director Human Resource

5. After approval by Agency Director, the Personnel Requisition is submitted to HCSA Human Resources for processing.
    a. Personnel Officer notifies the Hiring Manager that the requisition has been approved by the Agency Director.
    b. Posts position on the Internal Opportunity Announcement for one week. (This step will not be necessary if hiring via TAP or Payroll Services.)
    c. Obtains the certification list or assists with external recruitment and advertisement needs if requested by the department.
	HCSA Human Resources

6. Interviews and selects potential hire. Notifies HCSA Human Resources of potential hire. Forwards record of selection, application, list of references, and Consent to Release Information form to HCSA Human Resources.	Hiring Manager
7. Conducts reference checks on potential hire and notifies hiring manager and necessary parties of results. Contacts potential hire to collect all required information and documentation to process transaction(s).	HCSA Human Resources
8. Contacts potential hire to make contingent job offer. Candidates should be advised that offer is contingent upon successfully completing the pre-employment physical, fingerprint/background check* and approval from County Human Resources.	Hiring Manager or HCSA Human Resources
9. Initiates and completes the pre-employment process and updates the hiring manager throughout the process as needed. Notifies all parties of start date.	HCSA Human Resources

Creating a DocuSign Account

Creating an online DocuSign account allows you the ability to view all PREQ forms that are either awaiting your signature or documents that you have signed. Creating a DocuSign account also gives you the option of creating your personal signature.

DocuSign web page:

https://na2.docusign.net/Member/MemberLogin.aspx

Once you have signed up for an account, you will be sent an email allowing you to log into your account and create your personal profile.

Changing your Signature

Log into your DocuSign Account
From the Docusign dashboard, click on "Edit"

Create Your Signature

Full Name _steve Kline   Initials SK

CHOOSE   DRAW   UPLOAD

DocuSigned by: DS

_steve Kline   SK

342C84747976428...

DocuSigned by: DS

_steve Kline   SK

342C84747976428...

By clicking Create, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on envelopes, including legally binding contracts - just the same as a pen-and-paper signature or initial.

CREATE   CANCEL

At the Signature section for where you

AGENCY DIRECTOR: SIGNATURE: Sign   [ ] Approved   Decline   [ ] Signer   [ ] Designee   Test Account 2SK

AGENCY DIRECTOR: SIGNATURE: DocuSigned by: Test Account 2Sk   [ ] Approved   Decline   [ ] Signer   [ ] Designee   Test Account 2SK

Group Email Boxes

The following email boxes are used to allow approved department personnel to access the PREQ forms for signing.

Environmental Health Department Head Email box	EHDirectorDocuSign@acgov.org
Environmental Health Finance Department Email box	EHFinanceDocuSign@acgov.org
Public Health Department Head Email box	PHDirectorDocuSign@acgov.org
Public Health Finance Department Email box	PHFinanceDocuSign@acgov.org
Behavioral Health Department Head Email box	BHDirectorDocuSign@acgov.org
Behavioral Health Finance Department Email box	BHFinanceDocuSign@acgov.org
Human Resources Department Email box	HCSAeforms@acgov.org
Agency Director Email box	HCSADirectorDocuSign@acgov.org

DocuSign Email Workflow (normal process)

Immediate Supervisor (employee email)

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Department Director (employee email)

↓

Finance Department (Group email box)

↓

Department Head (Group email box)

↓

Agency Director (Group email box)

↓

Human Resources (Group email box)