GENERAL

# opm guide to processing personnel actions

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## OPM Guide to Processing Personnel Actions: The Complete Handbook for HR Professionals

In the federal workforce, personnel actions—such as hiring, promotions, salary adjustments, terminations, and rehires—are the backbone of effective human resources management. The Office of Personnel Management (OPM) publishes a comprehensive **OPM guide to processing personnel actions** that serves as the definitive reference for agencies seeking compliance, efficiency, and fairness. Whether you are a new HR associate or a seasoned agency manager, mastering this guide is essential to navigate the complex regulatory landscape, streamline processes, and support a high performing public sector workforce.

## Understanding OPM and Personnel Actions

### What is OPM?

OPM is the federal agency that administers the civil service system, overseeing personnel policies, benefits, and workforce planning. As the steward of federal human resources, OPM sets standards for hiring, performance, and career development, ensuring that the federal workforce is capable, ethical, and accountable.

### Why Personnel Actions Matter

Personnel actions are the mechanisms through which agencies implement policy, recognize performance, and maintain workforce integrity. Each action—whether a promotion, a pay increase, or a termination—carries legal, financial, and reputational implications. Accurate processing safeguards agencies from compliance violations, mitigates risk, and supports strategic objectives such as talent acquisition, retention, and diversity.

## The OPM Guide to Processing Personnel Actions: A Roadmap

### Overview of the Guide

The **OPM guide to processing personnel actions** is organized into three core sections: **policy and terminology**, **procedural steps**, and **compliance checklists**. It offers step by step instructions, decision trees, and sample forms, enabling HR professionals to handle each action with confidence and consistency.

### Key Terminology

- Personnel Action – Any formal change in an employee's status, duties, or compensation.
- Personnel Action Request (PAR) – The official document initiating an action.
- Personnel Action Report (PAR Report) – The consolidated record of all actions processed within a fiscal period.
- Office of Personnel Management (OPM) – The federal agency overseeing civil service personnel policies.
- Human Resources Information System (HRIS) – The technology platform used to track and manage personnel data.

### Core Processes

Each personnel action follows a standardized workflow: (1) Initiation, (2) Approval, (3) Documentation, (4) Implementation, and (5) Verification. The guide provides detailed templates and electronic forms for each stage,

ensuring traceability and audit readiness.

## Step by Step Process for Common Personnel Actions

### Hiring and New Hire Processing

New hires must complete a series of steps before they can begin work: background checks, eligibility verification, and onboarding. The OPM guide recommends the following sequence:

1. Candidate Screening – Confirm qualifications and eligibility.
2. Job Offer and Acceptance – Issue the official offer letter.
3. Background Investigation – Complete the required security clearance.
4. Personnel Action Request – Submit a PAR to initiate the hiring.
5. HRIS Update – Record the new employee in the system.
6. Orientation – Provide mandatory training and policy briefings.

### Promotions and Transfers

Promotions and transfers involve a reassignment of duties and often a pay adjustment. The guide emphasizes:

- Validating the promotion or transfer against the agency's merit system.
- Obtaining supervisory approval and confirming budget availability.
- Submitting a completed PAR and supporting documentation.
- Updating the employee's job classification and compensation in the HRIS.

### Salary Adjustments and Pay Increases

Salary changes are governed by federal pay scales, collective bargaining agreements, and agency policies. The OPM guide outlines the following steps:

1. Determine the appropriate pay grade and step.
2. Calculate the effective date based on fiscal calendar.
3. Prepare the PAR with justification and supporting evidence.
4. Obtain necessary approvals from the finance and HR departments.
5. Implement the change in the payroll system and confirm accuracy.

### Terminations and Resignations

Terminations—whether voluntary or involuntary—must follow strict procedural safeguards to protect both the employee and the agency. Key actions include:

- Documenting the reason for termination (performance, misconduct, or reduction in force).
- Conducting a final review and ensuring all paperwork is complete.
- Issuing the final paycheck and benefits documentation.
- Updating the HRIS to reflect the termination date and reason.
- Archiving all records in compliance with federal retention schedules.

### Reinstatements and Rehires

Reinstatements differ from rehires in that the employee's prior status is restored, often with the same pay and benefits. The guide recommends:

1. Verifying the employee's eligibility for reinstatement.
2. Reviewing any changes in policy or classification that may affect the reinstatement.
3. Submitting a reinstatement PAR with supporting documentation.
4. Reactivating the employee's record in the HRIS and confirming continuity of benefits.

### Leave and Disability Management

Leave requests—such as FMLA, PFL, or short term disability—require meticulous tracking. The OPM guide stresses:

- Accurate documentation of leave dates and eligibility.
- Ensuring compliance with federal leave laws and agency policies.
- Updating the employee's status in the HRIS to reflect leave.
- Providing regular communication to the employee about leave status and benefits.

## Compliance and Ethical Considerations

### Legal Framework

Personnel actions must align with a suite of federal statutes, including the Civil Service Reform Act, the Equal Employment Opportunity Commission (EEOC) guidelines, and the Office of Government Ethics (OGE) regulations. The OPM guide provides a compliance matrix that maps each action to its corresponding legal requirement.

### Data Privacy and Security

Handling personnel data involves protecting sensitive information such as Social Security numbers, security clearance details, and health records. The guide recommends:

- Using encryption for data transmission.
- Implementing role  based access controls.
- Conducting regular security audits.

### Conflict of Interest and Fairness

To maintain public trust, agencies must avoid conflicts of interest in personnel decisions. The OPM guide advises:

1. Declaring any potential conflicts before processing an action.
2. Having a secondary reviewer assess the action for bias.
3. Documenting the decision rationale in the PAR.

## Tools and Technology Supporting OPM Personnel Actions

### HR Information Systems (HRIS)

Modern HRIS platforms—such as the Federal Personnel Management System (FPMS) and the HRIS Integration Layer—provide real  time data, workflow automation, and audit trails. The guide emphasizes selecting systems that integrate seamlessly with OPM's e  processing portals.

### OPM's e  Processing Systems

OPM's e Processing portal allows agencies to submit PARs electronically, track status, and receive real time notifications. Key features include:

- Electronic signature capture.
- Automated validation checks.
- Integration with payroll and benefits systems.

### Automation and AI

Artificial intelligence is increasingly used to predict personnel trends, flag anomalies, and recommend action pathways

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