



# HCS LEAF Organizational Chart Review Process (OCRP) Flow Training

## Job Aid

### HCS LEAF OCRP Flow Training Job Aid

The Organization Chart Review Process Job Aid provides step by step procedures for making a request.

Access LEAF to check the status of your request.

Completed org. charts are available at:

<https://vawww.vashare.vba.va.gov/sites/VBAHRPortal/layouts/15/start.aspx#/OrgChart/Forms/Business%20Line.aspx>

<i>What you do...</i>	<i>What the system does...</i>
<p>Select the following link to access the <b>HCS LEAF Portal</b>:  <a href="https://leaf.va.gov/Other/101YA/VBA_Consolidated_Classification_Unit/">https://leaf.va.gov/Other/101YA/VBA_Consolidated_Classification_Unit/</a></p> <p>Access the HCS LEAF Portal</p>	The request process is accessed via LEAF.
<p>Select New Request/Start a new request icon located on the top left of the screen.</p>	Creates a new request document.
<p>1. <b>Step 1: General Information</b></p> <p>a) <b>Contact Info:</b> Enter requester name and phone number</p> <p>b) <b>Service:</b> Select an Option from the dropdown box of the Service Organization</p> <p>c) <b>Title of the Request:</b> Fill in the box using the following: Naming convention - Service, Position title and Type of Request</p>	Sets the Title for your request.
<p>2. <b>Step 2: Select Type of Request</b></p> <p>a) <b>Check the Box:</b> Organizational Restructure/Update</p> <p>b) <b>Select</b> Click here to Proceed arrow</p>	<b>Note:</b> This process will be modified in the future.
<p>3. <b>Step 3: Point of Contact Information (POC)</b></p> <p>a) <b>*Required Organization/Service Line:</b> Select from the dropdown menu</p> <p>b) <b>Define Service Line</b> if "Other" selected.</p> <p>c) <b>*Required HR Liaison or Organization POC:</b> Search/Enter name or organization POC</p> <p>d) <b>HR POC Phone Number:</b> Enter the phone number</p> <p>e) <b>Organizational Leadership:</b> Search/Enter the information</p> <p>f) <b>*Required Service Line POC:</b> Search/Enter the facility HR/HRC POC</p> <p>g) <b>SL POC Phone Number:</b> Enter the phone number</p> <p>h) <b>Additional POC if Required</b></p> <p>i) <b>Select</b> the Next Question arrow to proceed</p>	Required for processing and tracking request.



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<i>What you do...</i>	<i>What the system does...</i>
<p>4. <b>Step 4: Requested Action</b></p> <p>a) <b>*Required Justification for organizational changes:</b> Enter in provided template a summary for justification for organization changes</p> <p>b) <b>*Required Nature of Request:</b> Select from available radio buttons the nature of the change.</p> <p>c) <b>Select</b> the Next Question arrow to proceed</p> <p>d) <b>Note:</b> All changes require new signature other than minor changes. Minor changes or updates involve changes that do not change the grades, FTE numbers, or overall structure of the organization (example- changing a GS-0301-13 to a GS-0343-13)</p>	<p>Provide a brief justification. Make sure your justification includes reasons, and total overall changes.</p> <p>Select the Nature of your request.</p>
<p>5. <b>Step 5: Current Organization Information</b></p> <p>a) <b>*Required Mission Statement:</b> Attach a Word doc version of Mission Statement by selecting the Attach Additional File button and choosing your file to upload</p> <p>b) <b>*Required Total Positions Impacted by the Request:</b> Enter the number of full-time equivalent employees impacted by your request</p> <p>c) <b>*Required Provide the PO number of FTE/employee Impacted by the request position Information:</b> Enter the Position Description or PD Number, Number of Full Time Equivalent or FTE/employees impacted</p> <p>d) <b>Select</b> the Next Question arrow to proceed</p>	<p>Required items per VA handbook 5003 Position Management.</p>
<p>6. <b>Step 6: Current and Proposed Organization Chart Attach</b></p> <p>a) <b>*Required Select</b> the Attach Additional File button to upload the existing signed Org. Chart</p> <p>b) <b>*Required Select</b> the Attach Additional File button to upload the proposed Org. Chart</p> <p>c) <b>Select</b> the Next Question arrow to proceed</p>	<p>You must upload both your existing and proposed Organizational Chart for review.</p>
<p>7. <b>Step 7: Submit Request</b></p> <p>a) <b>Review and Submit Request</b></p> <p>Once request is completed, the system will send an email to the POCs.</p> <p>If you have questions or concerns, please reach out to the following:</p> <ul style="list-style-type: none"> <li>• Charles Battle @ <a href="mailto:charles.battle@va.gov">charles.battle@va.gov</a></li> <li>• Tanya Kelly @ <a href="mailto:tanya.kelly@va.gov">tanya.kelly@va.gov</a></li> </ul>	<p>Ensure the request is accurate prior to selecting Submit Request.</p>
<p>8. <b>Check the Status of Request</b></p> <p>a) <b>Check Status:</b> Access LEAF to check the status of your request.</p>	<p>Status of each request is displayed within LEAF.</p>



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### Access HCS LEAF Portal

Select the following link to access the HCS LEAF Portal:

[https://leaf.va.gov/Other/101YA/VBA\\_Consolidated\\_Classification\\_Unit/](https://leaf.va.gov/Other/101YA/VBA_Consolidated_Classification_Unit/)

The screenshot shows the HCS Leaf Portal interface. On the left, there are four main navigation buttons: 'New Request' (blue), 'Inbox' (green), 'Bookmarks' (teal), and 'Report Builder' (black). The main content area features a search bar and a table of requests. A red box highlights the 'New Request' button. The table contains the following data:

Date	Title	Service	Status
Jan 18	<b>3090</b> PA&I 2022 Organization Chart Updated Organizational Restructure/Update	Office of Performance Analysis & Integrity (20B)	Pending Office of Financial Management
Jan 18	<b>3089</b> LEAF Secure Certification Leaf Secure Certification		Pending Privacy Officer Review for LEAF-S Certification
Jan 12	<b>3088</b> LEAF Secure Certification Leaf Secure Certification		Not Submitted
Jan 4	<b>3085</b> Test Organizational Restructure/Update	Benefits Assistance Service (27)	Complete
Dec 29 2021	<b>3083</b> Test Organizational Restructure/Update	Benefits Assistance Service (27)	Complete
Dec 29 2021	<b>3082</b> Test Organizational Restructure/Update	Deputy Chief of Staff (20A1)	Complete
Dec 29 2021	<b>3081</b> Test Organizational Restructure/Update	Education Service (22)	Complete
Dec 29 2021	<b>3080</b> Test Organizational Restructure/Update	Continental District, Denver (20F4)	Complete
Dec 29 2021	<b>3079</b> test Organizational Restructure/Update	Benefits Assistance Service (27)	Complete

### Create a Request

Select New Request/Start a new request icon located on the top left of the screen.

This screenshot is identical to the one above, but with a blue arrow pointing to the 'New Request' button in the left-hand navigation menu. The button is highlighted with a red border.



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### Step 1: General Information

**Contact Info:** Enter requester name and phone number

**Service:** Select an Option from the dropdown box of the Service Organization

**Title of the Request:** Fill in the box using the following: Naming convention - Service, Position title and Type of Request

The screenshot shows a form titled "Step 1 - General Information". On the left, there are three labels: "Contact Info", "Service", and "Title of Request". A blue arrow points from the "Service" label to a dropdown menu. The dropdown menu is currently set to "Select an Option". Below the dropdown is a text input field with the placeholder text "Naming convention- Service, Position title and Type of Request".

### Step 2: Select Type of Request

**Check the Box:** Organizational Restructure/Update

**Select** Click here to Proceed arrow

The screenshot shows a web page titled "Resource Request". At the top right, there is a red box that says "Do not enter PHI/PII." and a welcome message "Welcome, Jennifer Estevez! | Sign out". Below this are navigation links: "Main Page", "Links", and "Help". The main content area is titled "Step 2 - Select type of request" and contains a list of options. The first option, "Organizational Restructure/Update (Update/Modify Org Chart (Review Position Management and Classification Principles))", is selected with a blue checkmark. A blue arrow points to this option. At the bottom right of the list, there is a button that says "Click here to Proceed" with a green arrow icon.



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### Step 3: Point of Contact Information (POC)

**\*Required Organization/Service Line:** Select from the dropdown menu

**\*Required HR Liaison or Organization POC:** Search/Enter name or organization POC

**HR POC Phone Number:** Enter the phone number

**Organizational Leadership:** Search/Enter the information

**\*Required Service Line POC:** Search/Enter the facility HR/HRC POC

**SL POC Phone Number:** Enter the phone number

Select the Next Question arrow to proceed

### Step 4: Requested Action

**\*Required Justification for organizational changes:**

Enter in provided template a summary for justification for organization changes

**\*Required Nature of Request:** Select from available radio buttons the nature of the change

Select the Next Question arrow to proceed



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### Step 5: Current Organization Information

- \*Required Mission Statement:** Attach a Word doc of the Mission Statement by selecting the Attach Additional File button and choosing your file to upload
- \*Required Total Positions Impacted by the Request:** Enter the number of full-time equivalent employees impacted by your request
- \*Required Provide the PO number of FTE/employee Impacted by the request position Information:** Enter Title/Series/Grade/PD#/Number of FTE required  
Select the Next Question arrow to proceed

Request #3085 - HCS Leaf Portal

leaf.va.gov/Other/101YA/VBA\_Consolidated\_Classification\_Unit/index.php?a=view&recordID=3085

3. Current Organization...  
4. Org. Chart Upload

Form completion progress: 50% Next Question

Current Organization Information

Mission Statement (Please provide the organization Mission/Vision Statement) \* Required

File Attachment(s)  
Test form.docx has been attached!

Attach Additional File

Total Positions Impacted by the Request. \* Required  
7

Provide the PD number, number of FTE/employees Impacted by the request position information (title, PP/SER/GR); \* Required

Input title/Series/Grade/PD/Number of FTE for that position  
Example-GS-0301-13-Program Specialist/ TBA or 39787(A or 0) (7)

Cancel Request

### Step 6: Current and Proposed Organization Chart Attach

- \*Required Select the Attach Additional File button to upload the existing signed Org. Chart**
- \*Required Select the Attach Additional File button to upload the proposed Org. Chart**  
Select the Next Question arrow to proceed

Request #3085 - HCS Leaf Portal

leaf.va.gov/Other/101YA/VBA\_Consolidated\_Classification\_Unit/index.php?a=view&recordID=3085

1. Point of Contact Informat...  
2. Action type  
3. Current Organization...  
4. Org. Chart Upload

Form completion progress: 80% Next Question

Organization Chart. Mandatory that approved AND proposed be attached or referenced

Current approved AND signed org chart with position marked: (if hard copy) \* Required

File Attachment(s)  
Test form.docx has been attached!

Attach Additional File

Proposed Organization Chart: (if hard copy) \* Required

File Attachment(s)  
Test form.docx has been attached!

Attach Additional File

Tools  
Show single page  
Cancel Request

Previous Question Next Question



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### Step 7: Submit Request

#### Review and Submit Request

Once request is completed, the system will send an email to the POCs.

If you have questions or concerns, please reach out to the following:

- Charles Battle @ [charles.battle@va.gov](mailto:charles.battle@va.gov)
- Tanya Kelly @ [tanya.kelly@va.gov](mailto:tanya.kelly@va.gov)

The screenshot shows the HCS Leaf Portal interface for Request #3085. A red banner at the top says "Please review your request before submitting" with a blue arrow pointing to a green "Submit Request" button. The page includes a "Tools" sidebar with options like "Edit this form", "View History", "Write Email", "Print to PDF BETA", "Add Bookmark", and "Cancel Request". The main content area shows "Test" under "Organizational Restructure/Update" and "Service Benefits Assistance Service (27) Initiated by Charles Battle". Below this is a "Point of Contact Information" section with fields for Organization/Service Line, HR Liaison, Facility HR/HRC POC, and Service Line POC.

### Check the Status of Request

The screenshot shows the HCS Leaf Portal interface with a table of request statuses. The table has columns for Date, Title, Service, and Status. A blue arrow points to the "Bookmarks" section on the left sidebar.

Date	Title	Service	Status
Jan 18	<a href="#">3090 PA&amp;I 2022 Organization Chart Updated</a> Organizational Restructure/Update	Office of Performance Analysis & Integrity (20B)	Pending Office of Financial Management
Jan 18	<a href="#">3089 LEAF Secure Certification</a> Leaf Secure Certification		Pending Privacy Officer Review for LEAF-S Certification
Jan 12	<a href="#">3088 LEAF Secure Certification</a> Leaf Secure Certification		Not Submitted
Jan 4	<a href="#">3085 Test</a> Organizational Restructure/Update	Benefits Assistance Service (27)	Complete
Dec 29 2021	<a href="#">3083 Test</a> Organizational Restructure/Update	Benefits Assistance Service (27)	Complete
Dec 29 2021	<a href="#">3082 Test</a> Organizational Restructure/Update	Deputy Chief of Staff (20A1)	Complete
Dec 29 2021	<a href="#">3081 Test</a> Organizational Restructure/Update	Education Service (22)	Complete
Dec 29 2021	<a href="#">3080 Test</a> Organizational Restructure/Update	Continental District, Denver (20F4)	Complete
Dec 29 2021	<a href="#">3079 test</a> Organizational Restructure/Update	Benefits Assistance Service (27)	Complete