

Appendix B

Process Map for Schedule Policy/Career Position Submissions

U.S. Office of Personnel Management

This process map defines the end-to-end process for submitting and adjudicating Schedule Policy/Career positions through a standardized digital workflow. It covers what agencies need to submit, how OPM reviews and vets each submission, and how positions are provided to the White House for final determination and inclusion in Schedule Policy/Career.

Three-Phase Workflow Overview

PHASE 1

Agency Submission & Intake

Agency uploads the Position Description and certifies its accuracy before submitting to OPM.

PHASE 2

OPM Review & Quality Control

OPM validates data and vets the position against Schedule Policy/Career criteria.

PHASE 3

Final Recommendation & Public List

Approved positions are compiled into the list for Presidential review.

Phase 1: Agency Submission and Intake

A. Where Agencies Start

Agencies initiate the process through the secure Schedule Policy/Career Submission Portal. This is the single-entry point for all submissions; there is no paper-based alternative.

B. What to Upload

Every submission requires a complete Position Description (PD) as either a PDF or DOCX file. Once the PD is uploaded, the system automatically processes the inputs, pulling out key data fields so agencies do not have to re-enter information that is already in the document.

C. What the System Fills in Automatically

After an agency uploads the PD, the system extracts and pre-populates the following fields when listed in the cover sheet or PD:

Field	Notes
Agency Name	Full agency name (no acronyms or abbreviations)
Subcomponent / Department	No acronyms or abbreviations permitted
Position Description Number	Extracted directly from the PD
Pay Plan & Grade Level	If not a GS pay plan, the system will prompt for a GS-equivalent level
Occupational Series	Extracted from the PD
Official Position Title	No acronyms or abbreviations permitted
Number of Positions Covered	The system will ask the agency to confirm this number
Bargaining Unit Status	Include union name, if applicable
Ethics Filing Requirements	OGE Form 450 (Confidential) or 278e/278-T (Public)
Major Duty Description	A brief description tying the position to one or more Schedule Policy/Career criteria, drawn from the PD's major duties section. Character limit is system-enforced.

Note

The Major Duty Description Narrative should demonstrate alignment with at least one of these criteria: policy-determining, policy-making, policy-advocating, or confidential.

D. What Agencies Enter Manually

After auto-population, the system asks agencies to identify additional field(s):

- Criteria Categories — select at least one of the four
- Position Vacancy Status — select either Incumbent or Vacant from a dropdown menu

E. CHCO Certification

Before the submission goes to OPM, a Chief Human Capital Officer (CHCO) or authorized designee must certify the package. This is a meaningful accountability step. The CHCO certifies that:

- The Position Description is accurate and current
- The position genuinely meets the Schedule Policy/Career criteria
- All information is correct and complete

This certification is backed by an electronic signature, a date/time stamp, and a digital audit trail.

F. System Validation

The system will not allow a package to advance if anything is missing or incorrect. Submissions are blocked when:

- Any required field is blank
- The PD file has not been uploaded
- A position title or field contains an acronym or abbreviation
- A GS-equivalent level is missing for non-GS pay plans
- The Bargaining Unit Status code is absent or invalid
- Financial Disclosure selections are missing

Once all requirements are met following CHCO submission, the package moves to the OPM Intake Queue for review. Agencies may recall any petition no later than five (5) business days from the submission deadline.

Phase 2: OPM Review and Quality Control

OPM will review each submission for completeness and accuracy and will vet the position against Schedule Policy/Career criteria. OPM reviewers assess whether the position meets one or more of the following:

- Policy-determining
- Policy-making
- Policy-advocating
- Confidential

A. Requests for Information (RFIs)

If OPM needs clarification or additional information, the agency will receive a formal Request for Information (RFI) through the system. The review will be paused until the agency responds. Agencies should monitor their submission portal and respond promptly to avoid delays. The system tracks

everything: the message trail, attachments, agency responses, and any updated PD versions. All data and entries are retained.

B. Reviewer Certification and Possible Outcomes

After OPM completes its review, an outcome designation will be assigned. Before a determination is made, OPM confirms that:

- The position meets Schedule Policy/Career criteria;
- All data has been validated;
- No open RFIs remain; and
- Documentation is complete and accurate.

OUTCOME	What it Means for the Agency
CONCURRED	The position is flagged as “Recommended for Schedule Policy/Career” and included in the draft recommendation list.
RETURNED	OPM needs additional information before making a final determination. The agency will be contacted.
NON-CONCURRED	OPM does not recommend the position. A formal Non-Concurrence Record is generated, and the agency is notified of the decision. The package is closed and archived.

Phase 3: Final Review and Public List

Before the recommendation list is submitted to the White House, agencies will receive a time-limited opportunity to review their entries for factual accuracy.

During the agency review window:

- Each agency can view only the entries that pertain to their submissions
- Agencies may flag factual errors for OPM correction (e.g., incorrect title, wrong series, outdated PD number, ineligible position)
- Agencies may not use this window to appeal non-concurrence determinations
- The review window is time-limited; the system enforces the deadline automatically

Important: The agency final review window is a quality-check step, not an appeals process. OPM retains final authority over all determinations. Non-concurrences are not subject to reversal through this mechanism.

Once the window closes, OPM will review any flagged corrections, make final adjustments as appropriate, and transmit the list to the White House. The list will be used to generate the Appendix for the Executive Order.

High-Level Process Map

Step-by-Step Flow	
STEP 1 Agency Intake	→ Upload the PD to the secure portal → System automatically extracts and pre-populates metadata → Review and verify all auto-populated fields, including the duties description generated from the PD → CHCO or designee certifies and submits the package to OPM → Agency may recall any petition(s) submitted to OPM, no later than five (5) business days following the OPM submission deadline.
STEP 2 OPM Review and Quality Control	→ OPM reviews the submission for completeness and vets it against Schedule Policy/Career criteria. → If additional information is needed, OPM sends an RFI; the agency must respond before the review can continue. → OPM makes a determination: concurred, returned for additional information, or non-concurred.
STEP 3 OPM Final Determination	→ Senior OPM official conducts final package review → Approver either approves, returns, or rejects the package → Approved positions move to the public recommendation list → Returned packages go back to OPM Reviewer for rework → Rejected packages are closed and archived, including agency notification
STEP 4 Agency Final Review	→ Agencies review the draft recommendation list for factual errors (time-limited window) → Agencies flag any errors to OPM for correction → OPM makes final adjustments and closes the window
STEP 5 Presidential Review & Approval	→ OPM finalizes the recommendation list and generates the Appendix for the Executive Order → OPM submits the complete package to the White House for approval