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Purpose
This guide will show you how to fill out the Position Management Action Form (PMAF). It will walk you through the steps of filling out the form to either create a new position or update an existing position.
Overview

The PMAF is a request to create or modify position management data in CI Records.
- All employees (other than volunteers) at CI, regardless of classification, require a position number.
- A position number should be established prior to any hiring actions.
- Click on the link for the current version of the Position Management Action Form.

Form Instructions

1. Complete the required fields listed below as described by the appropriate situation for either a new position or to update a position.

2. Submit the completed form to the Budget & Planning office, University Budget Analyst, Lindero Hall. Forms will only be accepted by the Budget & Planning office and not Human Resources.

Establishing a New Position

Contact Information – fill out requested information.

Action Requested – select “Establish a New Position” if establishing a new position, i.e. permanent or temporary position.

Action Reason – select the appropriate code “NEW.”

Effective date – the date the position will be effective.

Classification Title – the CSU classification title.

Job code – the four-digit job code from the classification specification.

Working Title – the title of the position, if applicable.

Grade/Range – the range code identifies an alternate range of a classification when the class has more than one assigned salary range. If there is no alternate range, the range code is 0.

Time Base – Based on a Full-Time Equivalent (FTE) of 1.0.

Department Name – name of the home (owning) department.

Home Department ID – the three-digit code used to identify the home (owning) department.

Fund Description – identifies the permanent/main funding source. Enter the appropriate code from the list below:

CERF = Continuing Education
GFND = General Fund
HSE = Housing
LTRY = Lottery
NA = Not Applicable
OTH = Other
PKG = Parking
RA = Reimbursed Activities
STH = Student Health
TRST = Trust, Other

Unit # - three-digit number that is associated with the warrant officer for the area.

Reports to Name – the name of the supervisor that the new position will report to (only one supervisor may be indicated, and they must be an Administrator).

Reports to Position # – the position number of the position that the new position will report to (only one supervisor may be indicated, and they must be an Administrator).

Regular/Temporary – Indicates whether the position is regular or temporary

Full-time/Part-time – full time is 1.0 FTE, part time is .99 FTE or less.

Single Incumbent – select if only one person can occupy and perform the job.
**Pooled Position** – select if more than one person can occupy and perform the job (for example, a custodian or lecturer) and enter the maximum head count (total number of employees that are allowed to occupy the position).

**Distribution of Labor Cost** – source of funding for the new position. If the funding is to be shared between multiple sources, designate the percentage from each source.

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**Update Existing Position**

**Action Requested** – select “Update Existing Position” if the position number already exists.

**Action reason** – select the appropriate Action Reason Code. See Action Reason chart in the appendix for definitions.

**Position number** – fill in the valid eight-digit number position number as assigned in CI Records/PeopleSoft.

**Effective date** – the date the position will be effective.

**Name of incumbent** – enter the name of the person currently holding the position.

**Classification Title** – the CSU classification title.

**Fields that may be updated on an existing position** (fill in only the changes being requested):

**Reports to Name** – the name of the supervisor that the new position will report to (only one supervisor may be indicated, and they must be an Administrator).

**Reports to Position** – enter the position number of the position that the new position will report to (only one supervisor may be indicated).

**Home Department ID** – the three-digit code used to identify the home (owning) department.

**Job code** – the four-digit job code from the classification specification.

**Regular/Temporary** – Indicates whether the position is regular or temporary

**Full-time/Part-time** – full time is 1.0 FTE, part time is .99 FTE or less.

**Distribution of Labor Cost** – source of funding for the new position. If the funding should be shared between multiple sources, designate the percentage from each source.

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If you have questions or need assistance completing the Position Management Action Form, please contact the University Budget Analyst or email the Budget Planning office at BudgetStaff@csuci.edu.
# Appendix

## Action Reason Codes

<table>
<thead>
<tr>
<th>Requested Action</th>
<th>Reason Code</th>
<th>Description &amp; Process Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactivate a Position</td>
<td>INA</td>
<td>This action inactivates a position. Positions are inactivated if they are no longer a viable vacancy. Positions are never deleted in PeopleSoft. <strong>Position must be vacant</strong></td>
</tr>
<tr>
<td>Job Reclassification</td>
<td>JRC</td>
<td>Used for a standard job reclassification (up or down). If the position is <em>not</em> vacant, a requisition form is required at the same time.</td>
</tr>
<tr>
<td>Add A Position</td>
<td>NEW</td>
<td>This action creates a new position in a department and should be used only for Permanent and Temporary Positions. Budget &amp; Planning will assign a new position number if the position was approved in the budget approval process, or if there is justification to how a temporary position will be funded.</td>
</tr>
<tr>
<td>Reorganization</td>
<td>REO</td>
<td>Used when processing a departmental reorganization. Typically, this change will include a change in reporting and/or departmental structure.</td>
</tr>
<tr>
<td>Temporary Job Reclassification</td>
<td>TJR</td>
<td>Used to temporarily reclassify a position. If the position is <em>not</em> vacant, a requisition form is required at the same time.</td>
</tr>
<tr>
<td>Update Data</td>
<td>UPD</td>
<td>To change one or more of the following data elements: Funding Source, Full/Part Time, Reg/Temp, and Standard Hours.</td>
</tr>
<tr>
<td>End Temp Job Reclassification</td>
<td>ETR</td>
<td>Used to end a temporary reclassification of a position.</td>
</tr>
<tr>
<td>Title Change</td>
<td>TTL</td>
<td>Used when the only item being updated is the position title.</td>
</tr>
<tr>
<td>In-Class Progress/Range Elev</td>
<td>ICP</td>
<td>Used to elevate the range of a position. In-Class Progression is a salary update and would indicate a change in salary for the incumbent.</td>
</tr>
<tr>
<td>Position Reactivated</td>
<td>REA</td>
<td>Used to reactivate a position that was previously inactivated.</td>
</tr>
</tbody>
</table>