Position Management Training

October 2014

Presented by:
Budget & Planning
Today’s Objectives

• Understand Position Management
• Review the Position Management Action Form
Topic Map

CONCEPTS

What is Position Management → Position Attributes and Relationships → The Position Management Process

TASKS

Creating New Positions → Update Employee’s Position Information
What is Position Management

The roof to the right represents a department. The figures represent people in the department.

- How many people are in this department?
- How many vacant positions are there?
What is Position Management

Let’s have these people take their seats. The chairs represent all the positions in this department.

• How many people are in this department?

• How many vacant positions are there?
What is Position Management

Position Management tracks positions by assigning them **position numbers**.

A person holding a position is an **Incumbent**.
What is Position Management

Position Management is a module that resides within CI Records

- **Manages** all positions in one central location
  - Filled, vacant, active, or inactive
- **A tool** for making more informed Human Resources and Budgeting decisions
- **Coordinates** 3 components:

  - **Position:** independent of an employee
  - **Person:** An employee
  - **Job:** The union of a position and person

  - Administrative Assistant II
  - “Chris”
  - “Chris” having the position of Administrative Assistant II
What is Position Management

With Position Management, a job is a union of the Person and a position.

- A Job **cannot exist** without a **Position** and a **Person**
- A Position can **exist** without a **Job** or a **Person** (a Vacancy)
How is Position Data Different from Job Data?

**Position Data**
- Job Code
- Location
- Standard Hours
- Position number
- Headcount
- **Home Department**
- Position FTE
- Reports To
- **Unit Code**

**Job Data**
- Job Code
- Location
- Salary
- Job FTE
- Standard Hours
- Position Number
- Reports To
- Funding Department
A *position* is an organizational designation within the organization, independent of any particular employee.

- When an employee (incumbent) leaves a position, the *position remains* (vacancy) to be filled again.
- Employees in a *position share the following attributes*: Business Unit, Job Code, Home Department, Reports To, FTE, and Position Funding.
- An employee in a *job has specific attributes*: Salary and Job FTE.
A position can have multiple incumbents.  
When could this be useful?

A position’s Headcount indicates the planned maximum number of incumbents for a position.
Head Count (Single Incumbent)

Normally one position is created for each expected appointment/incumbent
• A unique position number (1:1 position to incumbent) is required for:
  ➢ All MPP positions
  ➢ Most Staff positions
  ➢ All staff and faculty funded from multiple accounts (split level funding)
Head Count (Pooled Position)

Certain mandatory & optional exceptions where multiple head count positions are created:
• All Tenure Track Faculty Positions
• Temporary lecturer positions
• Student/Work-Study positions
• Some Staff Positions – when all data elements are identical: Home Dept, Job code, Range, Working Title, Supervisor, and Unit code
• Miscellaneous Immediate Pay (includes job codes 2322, 2323, 2356, 2357, 2362, 2363, 2365, 2457 & 4660) – job code and funding must be the same
Position Attributes

Navigation in CI Records for Position Management:
Position Attributes

Positions are created and viewed from the Add/Update Position page in the Position Management module.
Required fields:
• **Effective Date**
• **Reason** (Reason Code)
• **Job Code**
• **Title**
• **Department**
• **Location**
• **Reports To**
Position Attributes – Funding

Positions are funded on the Department Budget Table.
Position Management Process
Creating New Positions or Backfilling Existing Ones

- A Department will have a need to fill or create a new position under 1 of 3 circumstances:
  - Vacancy
  - Approved FY Position
  - Need for a New Temporary Position

- Departments should contact HR first to review and confirm classification requirements.
  - Will help justify budget request for salary

- A Position Management Action Form is the means to create or modify position data.
  - Departments submit completed PMAFs to their respective AVPs for initial review and approval.

- Completed and approved forms are submitted Budget & Planning.
Position Management Process
Creating New Positions or Backfilling Existing Positions (Cont.)

- B&P enters approved position data into CI Records which automatically creates a Position Number. B&P provides Department with Position Number.

- Departments complete the Employee Requisition form with the position number and submits the Requisition and PD to HR.

- Recruitment Process begin.

Note: Budget and Planning is responsible for the data entry of PMAFs into CI Records.

- AVPs and Budget Managers are responsible for understanding and monitoring the data of positions within their organizational responsibility
Position Management Process

Updating Positions

Before making changes to Position Data, ask yourself this helpful question:

– Does the change impact the position or a specific person’s job?

1. If it is an on-going change, change at the position.

2. In-year change, change at the Job Data.
Position Management Action Form (PMAF)
Position Actions - NEW

NEW (new position)
• Use NEW to request that a new position be created
• Review existing positions to see if a position already exists (or could be modified) to meet Dept. requirements

Example:
• The Library has salary savings and would like to hire a temporary ASC to help with increased demand.
  ➢ Upon review of their Position/Incumbent Report, this department finds no existing position.
    o This department can now submit a PMAF to create a new position.
Position Actions - NEW

Key questions to consider:

• Is the need due to a new job function in the department (new position) or replacing/revising an existing job function (modify position)?

• How should this position be reflected in the position history (within Position Management) of the department?
Position Actions – JRC and ICP

JRC (job reclassification) and ICP (in class progression/range elevation)

PMAF form:
• Provide Position Number, new Job Code and/or new Grade/Range

Job Reclassification & In Class/Range Elevation for filled positions:
• Department must submit copy of the letter from HR granting the reclassification or in class/range elevation.
Position Actions – TTL

TTL (title change)
• Use TTL to update the title for a position

PMAF:
• Provide POSITION NUMBER and WORKING TITLE

Example:
A manager position in Arts & Sciences is changing its title from ASSISTANT MANAGER to ASSOCIATE MANAGER
• Arts & Sciences will submit a PMAF to update title
Position Actions – UPD

UPD (update)
- Use UPD to update one or more of the following data segments:
  - Reports to Position # (must be MPP/AVP)
  - Home Department
  - Funding Source
  - FTE (may have to follow up with HR)
  - Head count

PMAF:
Provide Position Number and all other data elements to be updated

Example:
The funding department for position 00001987 in Facility Services has changed from department 340 to 561.
- This department will submit a PAR to update funding from T01 to T03
Position Actions

• For ALL position actions, please provide only those data elements that are NEW or CHANGING

• When multiple position actions are necessary, please provide the data segments required for each and we’ll process all updates using appropriate position action.
  ➢ i.e. check UPD if more than one action is needed.

• Effective date for position action is generally the first day of the current month

• However, in some situations it is necessary for the effective date to be retroactive to a previous period – contact B&P if you have questions
Access to Training Resources

Training materials: http://www.csuci.edu/financial-services/budget/

- Additional Information
- Quick Reference Guides
- Links to Forms and Key Information

Send your questions to: janson.chapman@csuci.edu