Position Management Training

October 2014

Presented by:
Budget & Planning

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Today's Objectives

- Understand Position Management
- Review the Position Management Action Form

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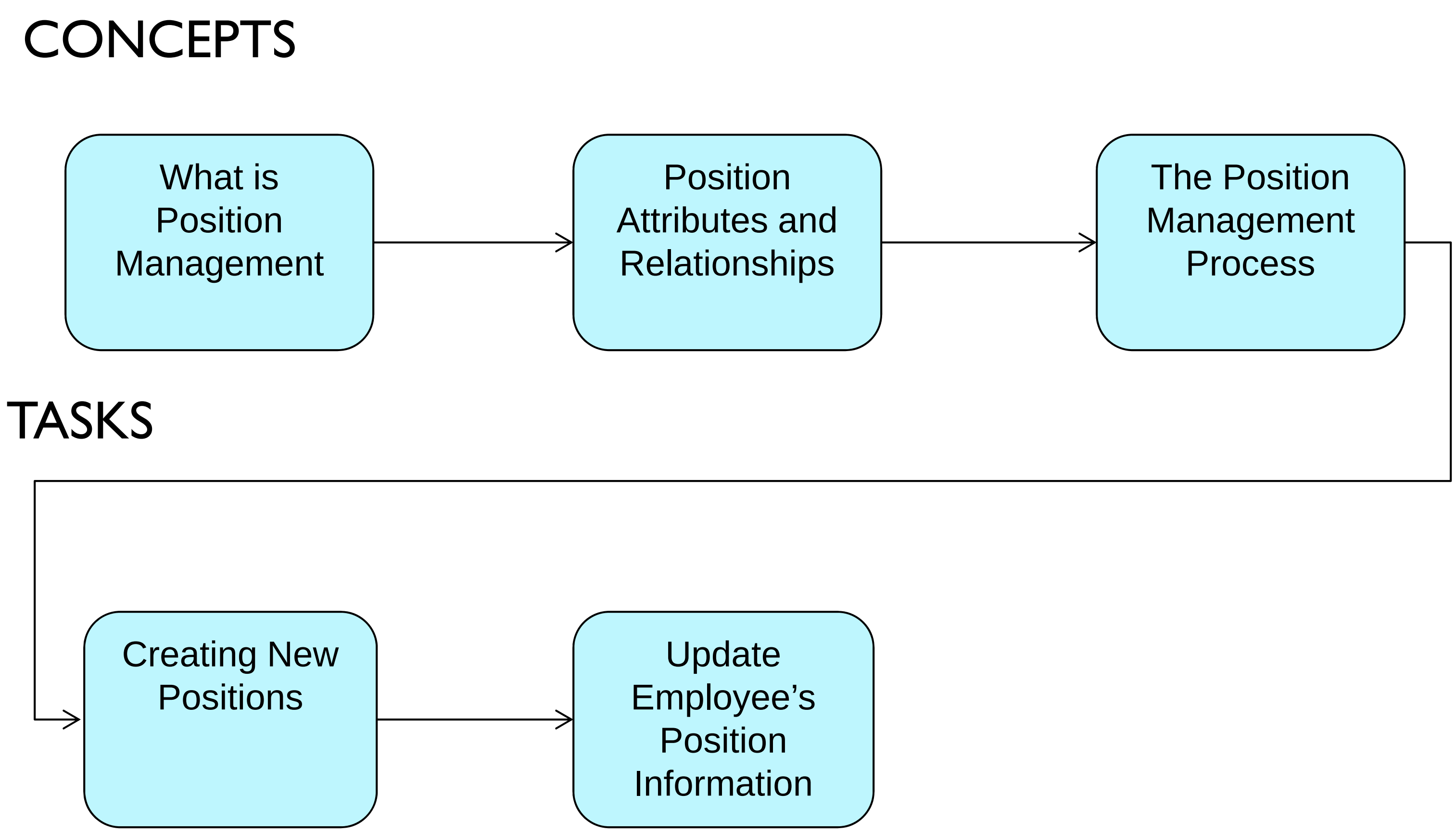
Topic Map



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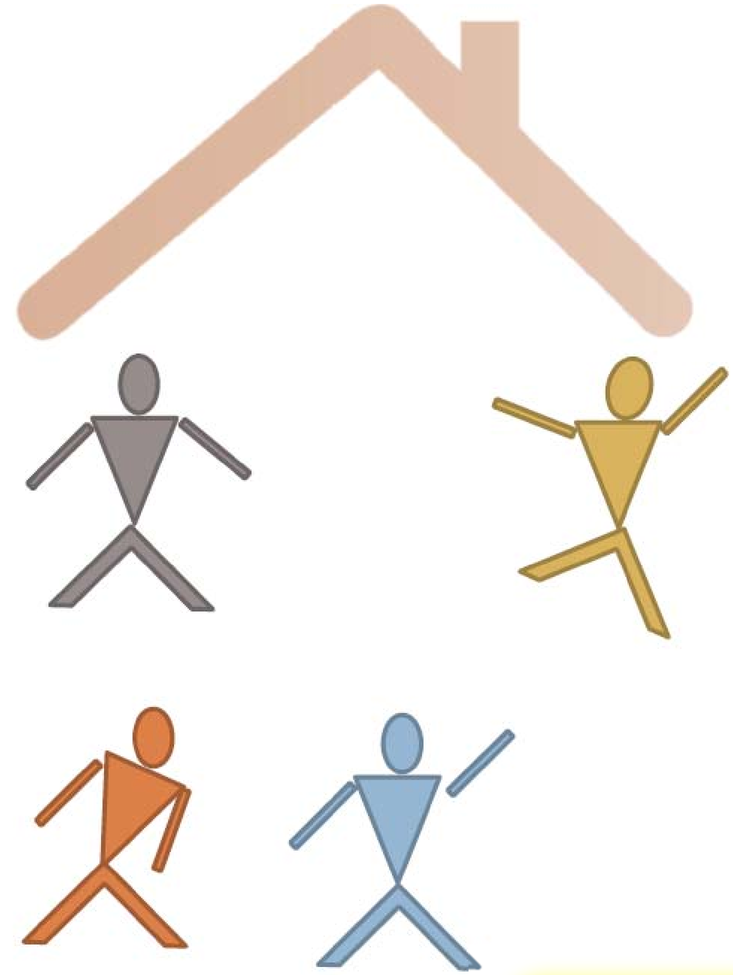
What is Position Management

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?

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What is Position Management

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?

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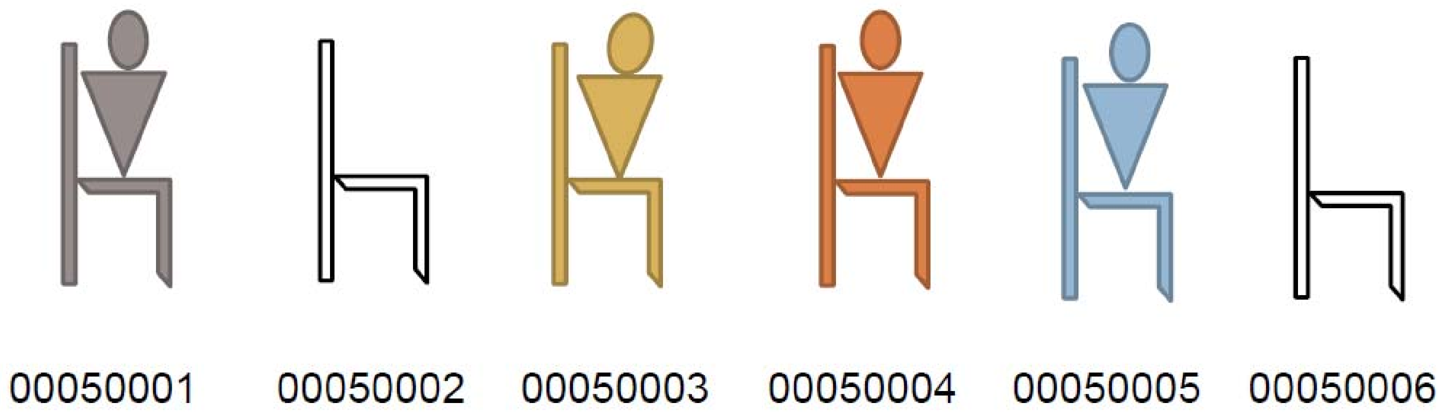
What is Position Management

What is Position Management



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

A person holding a position is an ***Incumbent.***

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What is Position Management

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

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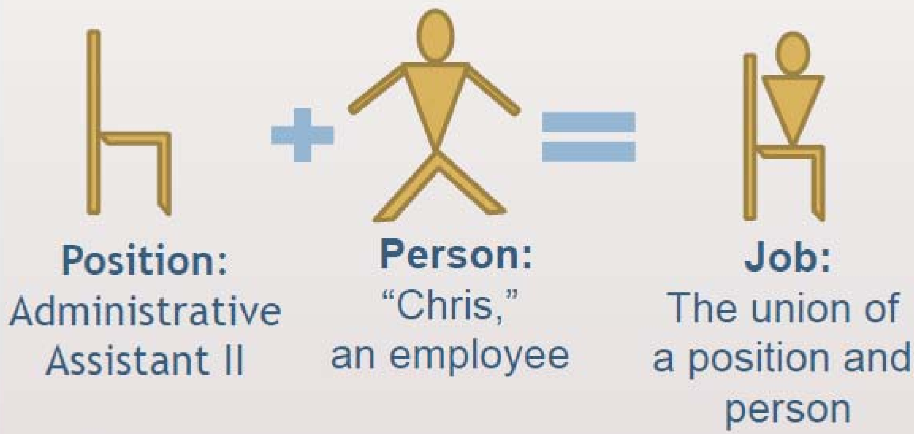
What is Position Management

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**)

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What is Position Management

How is Position Data Different from Job Data?

Position Data

- Job Code
- Location
- Standard Hours
- Position number
- Headcount
- **<u>Home Department</u>**
- Position FTE
- Reports To
- **<u>Unit Code</u>**

Job Data

- Job Code
- Location
- Salary
- Job FTE
- Standard Hours
- Position Number
- Reports To
- Funding Department

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What is Position Management

Position Management – A Review

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.

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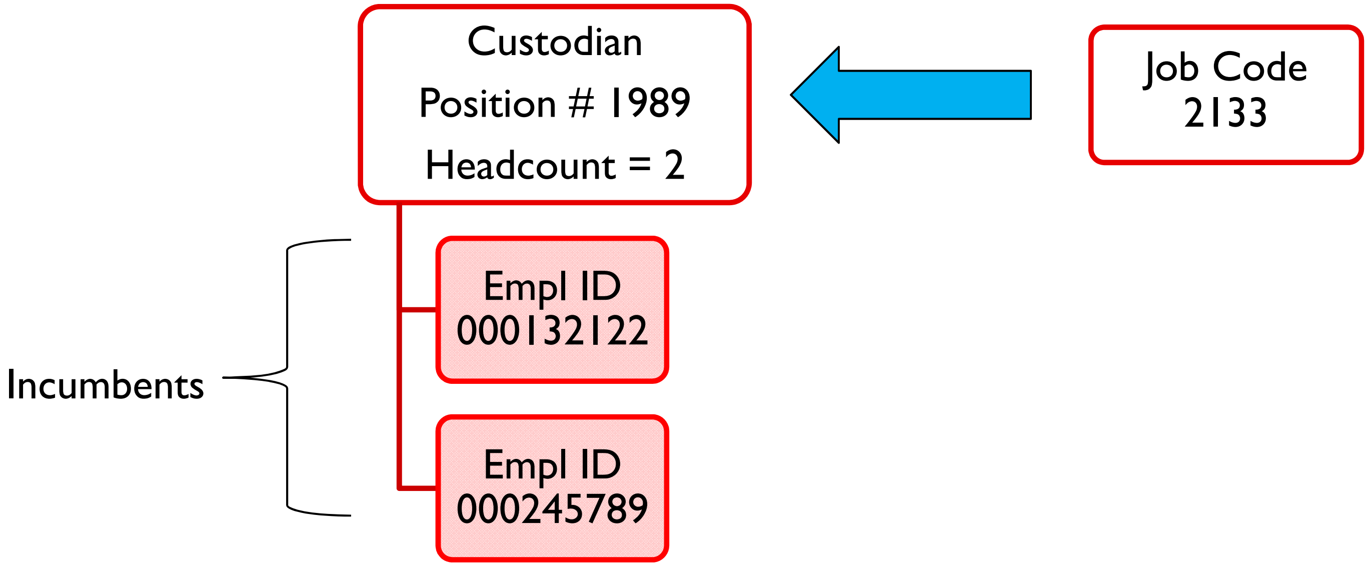
What is Position Management

Relationship Functionality in Position

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.



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Position Attributes and Relationships

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)

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Position Attributes and Relationships

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

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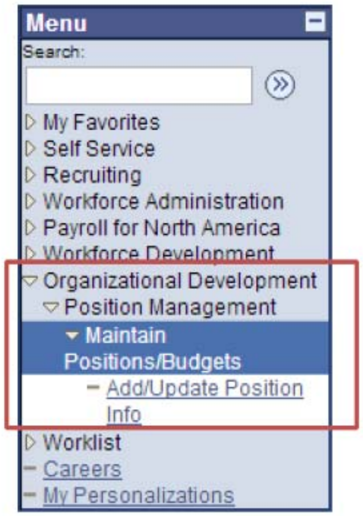
Position Attributes and Relationships

Position Attributes

Navigation in CI Records for Position Management:



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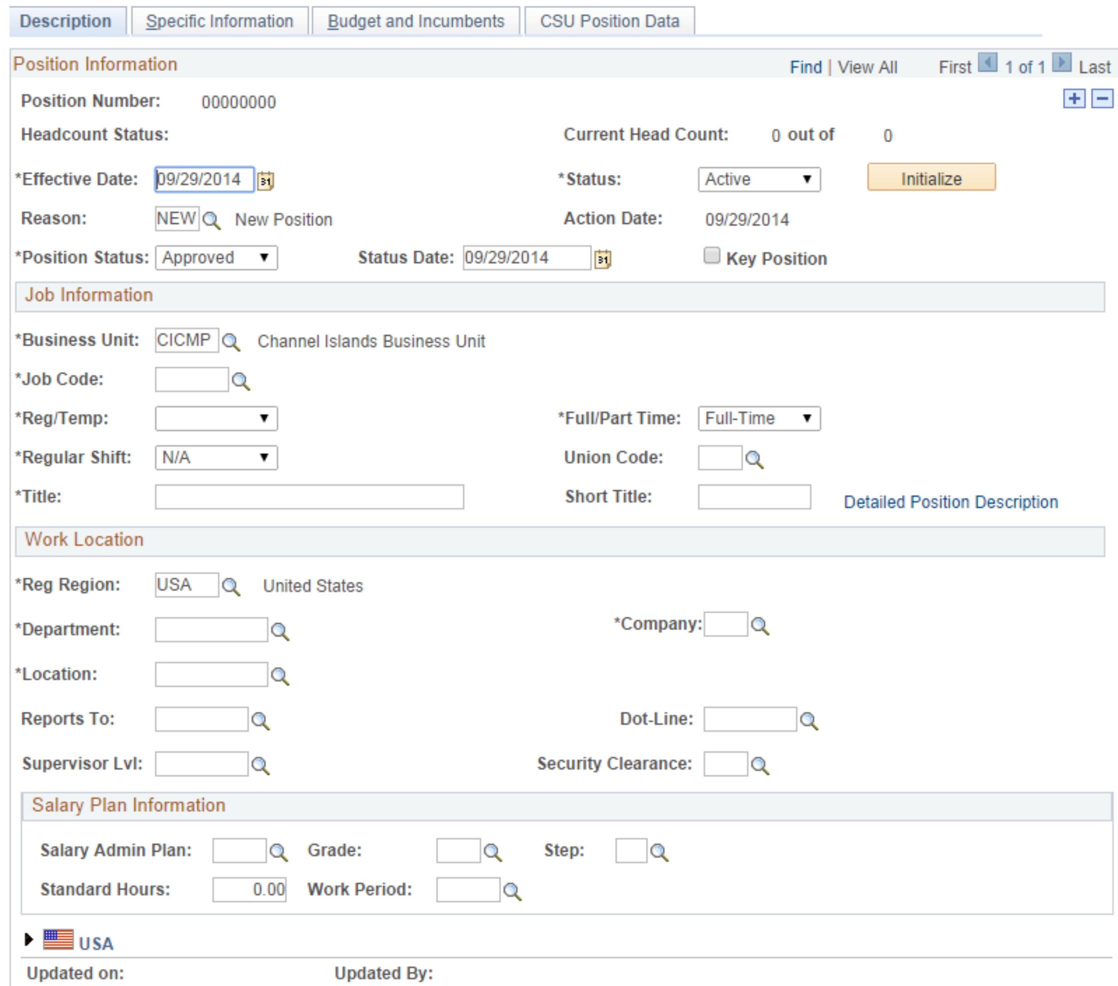
Position Attributes and Relationships

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**



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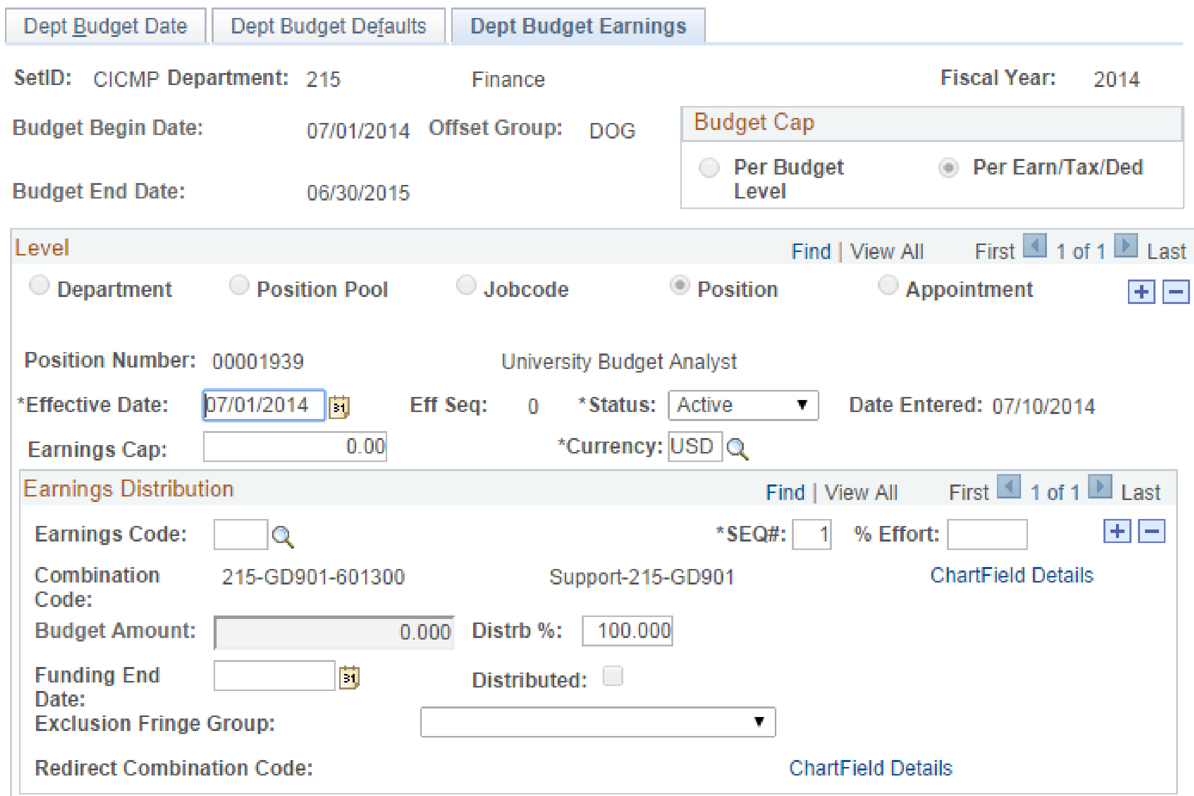
Position Attributes and Relationships

Position Attributes – Funding

Positions are funded on the **Department Budget Table**.



Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings

SetID: CICMP Department: 215 Finance Fiscal Year: 2014

Budget Begin Date: 07/01/2014 Offset Group: DOG

Budget End Date: 06/30/2015

Budget Cap

Per Budget Level | Per Earn/Tax/Ded

Level Find | View All First 1 of 1 Last

Department | Position Pool | Jobcode | Position | Appointment

Position Number: 00001939 University Budget Analyst

*Effective Date: 07/01/2014 Eff Seq: 0 *Status: Active Date Entered: 07/10/2014

Earnings Cap: 0.00 *Currency: USD

Earnings Distribution Find | View All First 1 of 1 Last

Earnings Code: *SEQ#: 1 % Effort:

Combination Code: 215-GD901-601300 Support-215-GD901 ChartField Details

Budget Amount: 0.000 Distrb %: 100.000

Funding End Date: Distributed:

Exclusion Fringe Group:

Redirect Combination Code: ChartField Details

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Position Attributes and Relationships

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.

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The Position Management Process

Position Management Process

<u>Creating New Positions or Backfilling Existing Positions (Cont.)</u>

- B&P enters <u>approved position</u> 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*

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The Position Management Process

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.

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The Position Management Process

Position Management Action Form (PMAF)

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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.

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Creating New Positions

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?

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Creating New Positions

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.

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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

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Updating Employee's Position Information

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

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Updating Employee's Position Information

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

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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

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