

# Position Management Training

*Fiscal Year 2020-21*



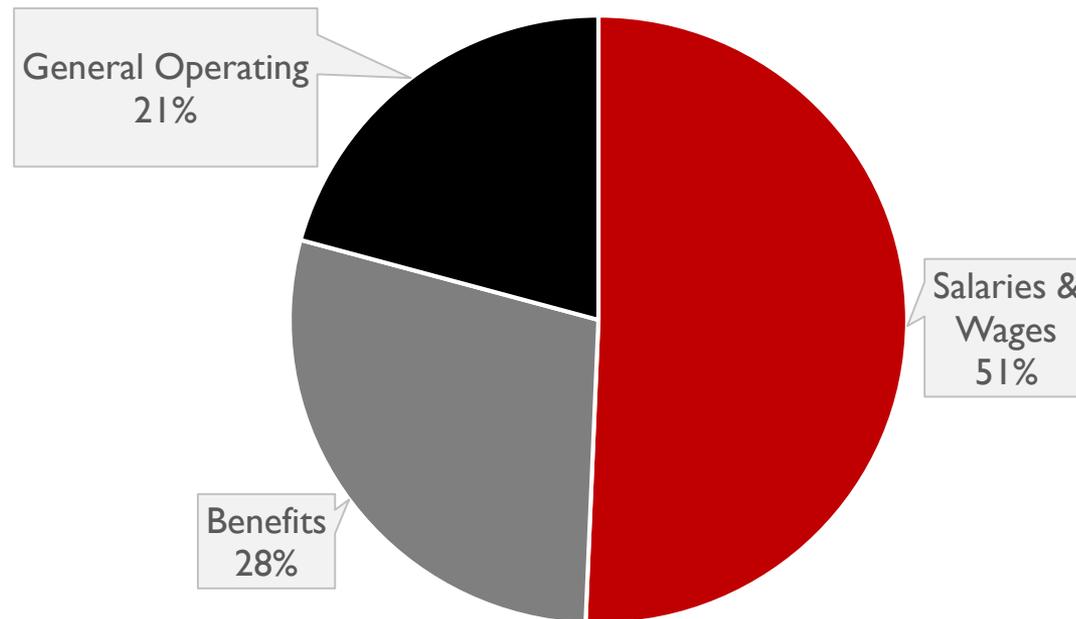
# Objectives

- 1) Understand what Position Management is at CSUCI and why it is important
- 2) Know when to submit a Position Management Action Form (PMAF), Employee Requisition Form (Req), and/or Payroll Expense Transfer Form
- 3) Recognize when completed forms will reflect in the LCD Dashboard of the Data Warehouse

# Importance of Position Management

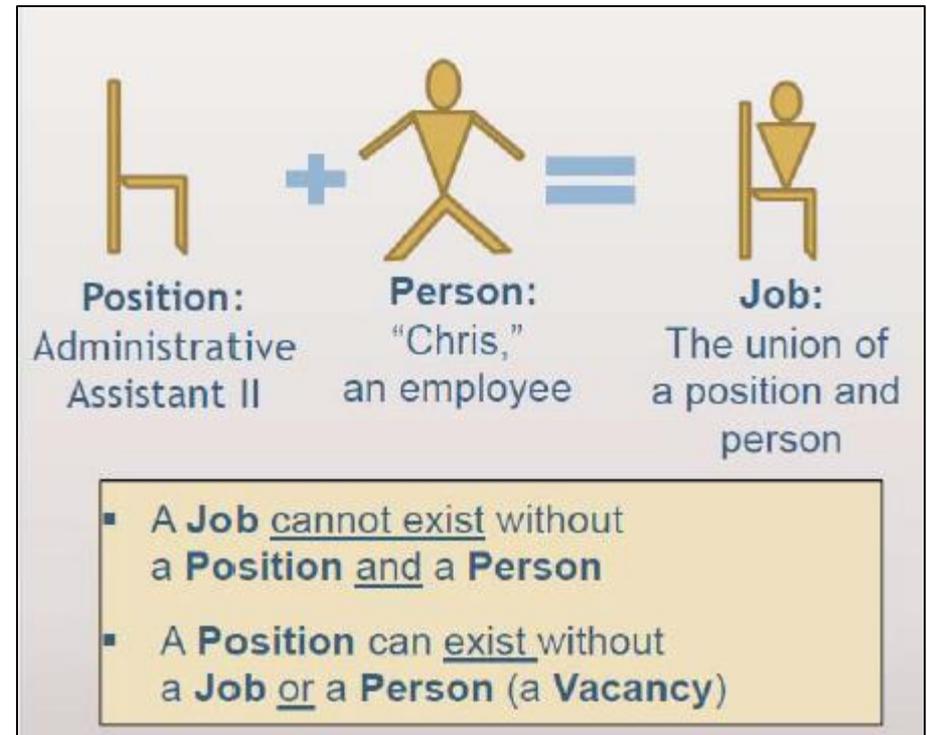
We have a fiscal responsibility to manage total compensation (Salaries & Wages + Benefits), as it accounts for 79% of the University's Operating Base Budget:

2020-21 Operating Base Budget = \$130M

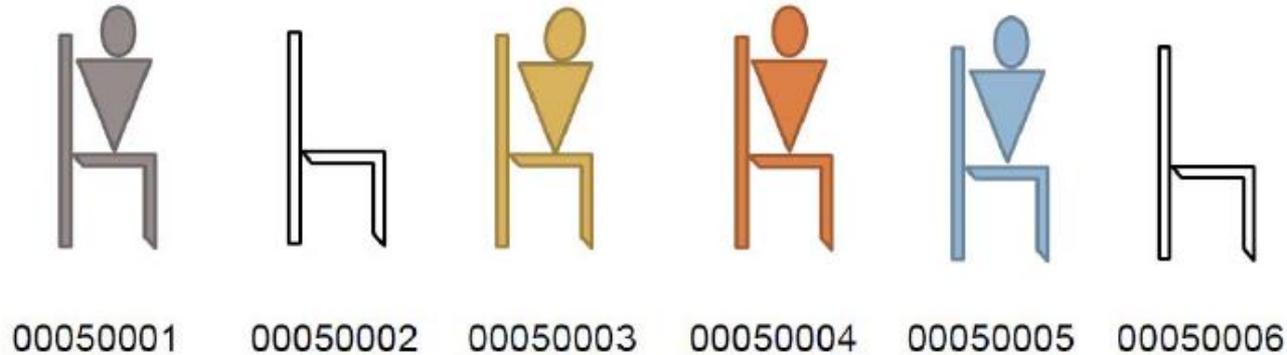


# What is Position Management?

- Positions are employment roles tracked by position numbers
- A person in a position is an incumbent employee tracked by an employee ID number
- A job is the union of a person assigned to a position



# Position Management Budget



Positions are budgeted permanently or temporarily:

- Permanent budget remains regardless if the position is filled or vacant, carries over year to year, and is adjusted with salary changes
- Temporary budget ceases when the position becomes vacant, does not carry over year to year, and is typically funded by the division

# Updates to Budget and Actuals

## Budget:

- Uploaded to accounting strings annually
- Adjustments uploaded quarterly

## Actuals:

- Posted to accounting strings monthly:
  - Paychecks
  - Payroll Expenditure Transfers

# Headcount

A position can have:

- A single incumbent employee
  - Headcount = one
- Multiple incumbent employees
  - Referred to as a pooled position
  - Headcount = more than one
  - A pooled position's headcount indicates the maximum number of incumbent employees planned
  - All incumbents assigned to a pooled position must have the same set-up attributes

# Single Incumbent

- Typically, a unique position number is created for each position
- A unique position number is required for:
  - Management (MPP) positions
  - Staff positions
  - Split-level funding positions – positions that are funded by and charged to multiple accounting strings (set up by percentages)

# Pooled Positions

Exceptions where pooled positions can be created:

<b>Position Type</b>	<b>Job Code(s)</b>
FT Faculty Unit-Add'l Employment	2403
Special Consultants	4660
Temporary Faculty/Lecturers	2358
Extended Faculty	2322, 2363
Librarians	2920
Student Assistants/Teaching Associates/Work-Study	All

# Pooled Positions: Appointment Level Funding

An incumbent in a pooled position can be set up with appointment level funding in order to be charged to a different accounting string compared to other incumbents in the same pooled position.

## Process:

1. Submit an Employee Requisition to HR indicating the incumbent as appointment level in the position
2. HR will assign a record number for the incumbent
3. Submit a PMAF to Budget & Planning, completing page 2 of the form indicating the incumbent and the newly assigned record number to have appointment level funding under the pooled position

# Employee Record Numbers

- A new record number is needed for appointment level funding on an incumbent in a pooled position★
- Record numbers are associated with an employee's history of positions held at CSUCI
- Record numbers are most frequently used for faculty and student assistants

★ If an incorrect record number is entered on the PMAF, the incumbent could be charged to an incorrect accounting string and/or position.

# Home Department vs. Accounting String Department

A pooled position must have one home department, but incumbents can be charged to different accounting strings.

Home Department:

- The department the incumbent works in according to the organizational chart
- Does not necessarily indicate where the incumbent is budgeted and/or charged

Department in Accounting String (Funding/Distribution):

- The department the position is budgeted in and charged to
- Can be different from Home Department

# Position Management Forms

Form	Processor	Link	Purpose
Position Management Action Form (PMAF)	Budget & Planning	<a href="https://www.csuci.edu/financial-services/forms-tutorials.htm#budget">https://www.csuci.edu/financial-services/forms-tutorials.htm#budget</a> ★	To create or modify a position
Employee Requisition (Req)	Human Resources	<a href="https://www.csuci.edu/hr/documents/req-plus-guidelines060315-form-fillable.pdf">https://www.csuci.edu/hr/documents/req-plus-guidelines060315-form-fillable.pdf</a>	To recruit or fill a position, or to update employee set up in position
Payroll Expenditure Transfer Form	Budget & Planning	<a href="https://www.csuci.edu/financial-services/forms-tutorials.htm#budget">https://www.csuci.edu/financial-services/forms-tutorials.htm#budget</a>	To move payroll expenditures to a different accounting string

★ Please use your division's workflow from this link instead of originating in AdobeSign templates or creating your own. This ensures the form will be reviewed and approved by the appropriate parties.

# PMAF and/or Req Form Required

Action	PMAF	Req
Create a new position (must be approved through annual budget request process first)	X	
Recruit or appoint an employee to a position, or extend/change appointment		X
Update position data: Home Department, Unit, Reports To, FTE, Funding Status, Headcount	X	X
Update funding/distribution, including appointment-level if applicable	X	
Update a position's job code or grade based on HR-approved reclassification or IRP	X	X
Change a position's title	X	X
Create a temporary backfill position for a vacant, permanent position	X	
Deactivate a position	X	
Update an employee's salary		X
Request a stipend for an employee		X

# Effective Dates

- The effective date for a position action is generally the first day of the current month or of a future month
- In some situations, a retroactive date is necessary★
- Submit PMAFs by the 25<sup>th</sup> of the month for a position action to be active in the same month submitted

★ A Payroll Expenditure Transfer Form may be required to adjust the accounting string that the employee/position was previously charged to.

# Payroll Expenditure Transfer Form

If you encounter an accounting string error:

## ACTION:

Complete a  
Payroll  
Expenditure  
Transfer Form



## OUTCOME:

Changes the  
accounting string  
and/or %  
distribution



If permanent  
change,  
complete a  
**PMAF**

( if you have not  
already)

If one-time error,  
no further action  
is needed

# Payroll Expenditure Transfer Form Submission

- Only enter salaries & wages, not benefits (benefits follow the check automatically)
- Attach LCD Payroll Detail report with: (\*indicates default setting of report)
  - Dept Fdescr\* - department
  - Fund Fdescr\* - fund
  - LCD Empl ID\* - employee ID number
  - LCD Empl RCD\* - employee record number
  - Account Fdescr – account
  - Project or Program Fdesc – project or program code, if applicable
  - LCD Position Number – position number
  - LCD Name – employee name
  - LCD CSU Paycheck Nbr – paycheck number
  - FTE – full time equivalent
  - Change Show Time to Accounting Period Descr
  - Keep Show Measure as LCD Posted Total Amount\*

# Data Warehouse: LCD Dashboard

Labor Cost Distribution (LCD) Dashboard updates monthly:

- LCD is posted no later than the 10<sup>th</sup> of each month
- Reflects all payroll transactions and position management forms submitted by the 25<sup>th</sup> of the previous month
- Provides employee-level payroll transaction detail
- Access must be requested and approved, and is granted after training is completed

# Helpful Hints

- Use the appropriate, current form links posted on our websites
  - For approval workflows to work correctly, do not originate forms in AdobeSign or create your own
- Review last page(s) of form for field descriptions and instructions
- Refer to Position Management spreadsheet as a data source in filling out forms (provided quarterly to each division's main budget analyst contact)
- Attach additional documentation to support your request
  - HR memo or email
  - Any other approvals or confirmations required (i.e. Exception to Hiring Chill, grant approval)
  - LCD Dashboard Payroll Detail report (for Payroll Transfers)
- Submit comments that clearly describe the request and reason
- Download and save completed forms for reference

# Questions / Feedback / Support

- Refer to our website at <https://www.csuci.edu/budget/>
- Contact our Budget & Information Systems Manager, Lisa Woods
  - ❖ Call x 8402
  - ❖ Chat in Microsoft Teams
  - ❖ Email [Lisa.Woods@csuci.edu](mailto:Lisa.Woods@csuci.edu)
  - ❖ Visit Lindero Hall, Office 1782