

Position Management Training

March 2017



CI Budget & Planning - Presenter

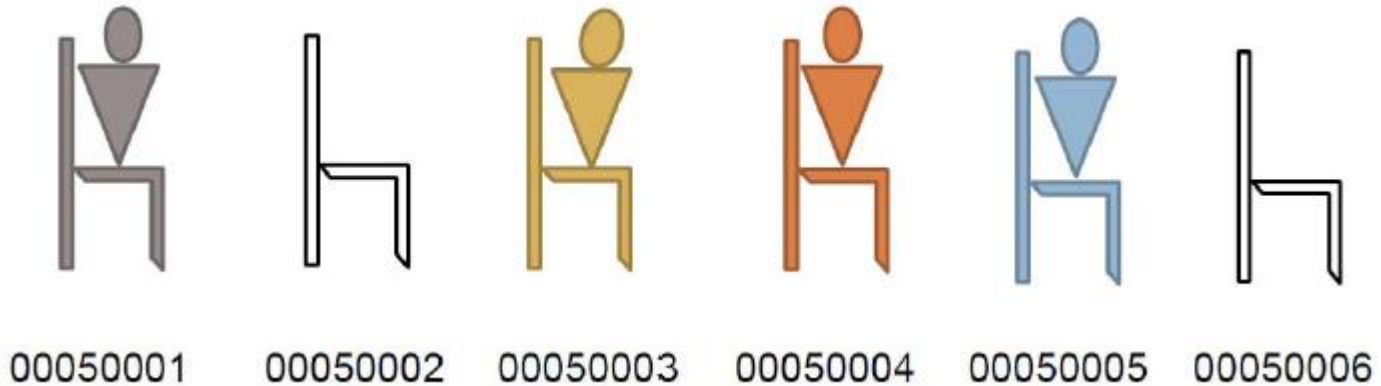
➤ Jennifer Moss

- Manager, Budget & Planning

Objectives

- 1) Understand Position Management
- 2) Review the Position Management Action Form
- 3) Answer end user questions
- 4) Solicit feedback

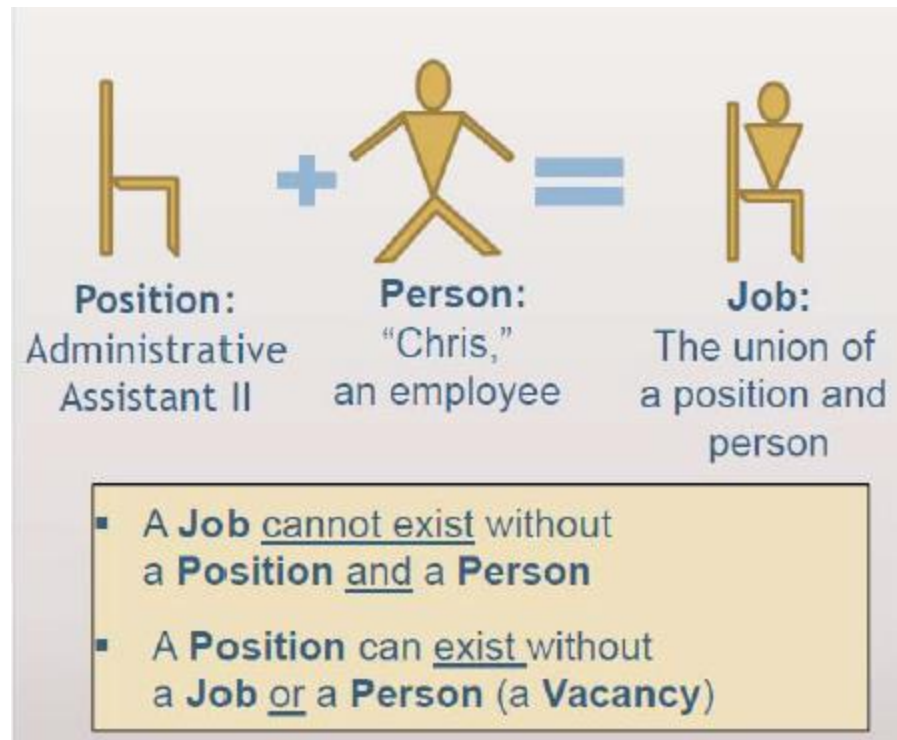
What is Position Management?



- Position Management tracks **POSITIONS** by assigning them **POSITION NUMBERS**
- A person holding a position is an incumbent

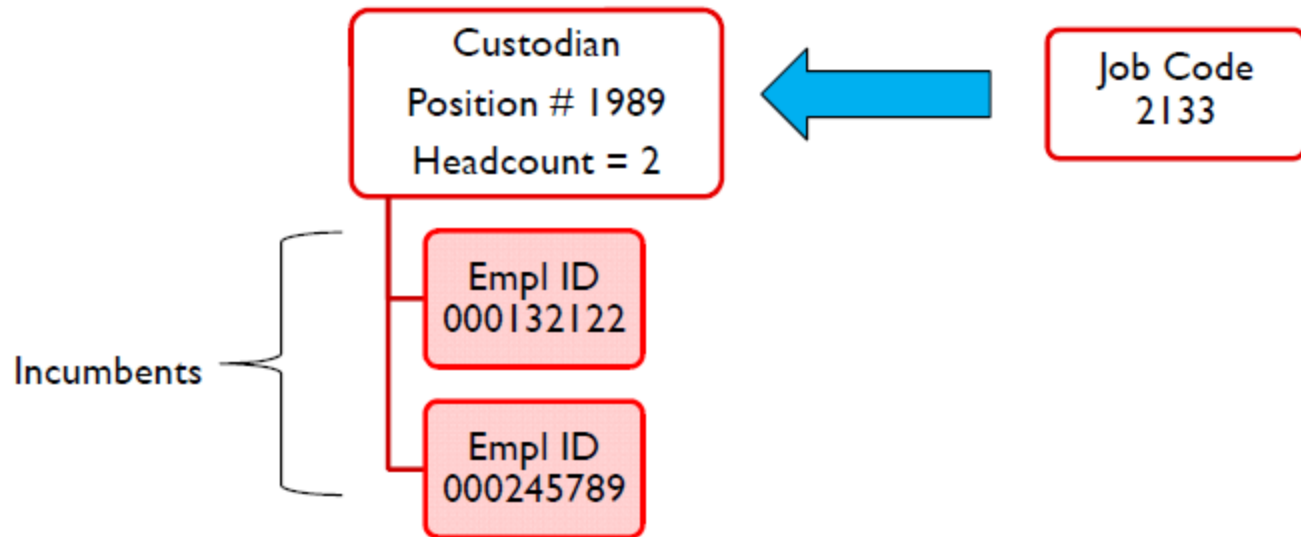
What is Position Management?

- With Position Management, a JOB is a union of the PERSON and a POSITION



Position Management – Headcount?

- A POSITION can have multiple incumbents
- A positions HEADCOUNT indicates the planned maximum number of incumbents for a POSITION



Headcount – Single Incumbent

- Normally, only one (1) POSITION is created for each appointment
- A unique POSITION NUMBER is required for:
 - All MPP positions
 - Most staff positions
 - All staff and faculty funded from multiple accounts (split level funding)

Headcount – Pooled Position

- Exceptions where multiple head count positions are created:
 - Tenure Track faculty positions
 - Temporary lecturer positions
 - Student / Work-Study positions
 - Some staff positions (job codes 2322, 2323, 2356, 2357, 2362, 2363, 2365, 2457, 4660)

Position Management Action Form



**POSITION MANAGEMENT
ACTION FORM**
Budget & Planning

This form is to be used for position management actions such as:

- **Establishing a new position (Permanent or Temporary)**
 - Before requesting a new position number, please ensure there is not an existing position number available
- OR -
- **Updating or revising an existing position**
 - Updates may include changes to the Home Department ID, Funding Source, FTE, Reports to, a reclass, or the active status of a position number.

For definitions of fields, refer to the attached Quick Reference for Position Management Form.

Contact Information

Requestor: _____
 Requestor's Phone: _____
 Department & Division: _____

Action Requested

New UPD JRC ICP TTL

Position #: _____ Empl ID (for appointment level funding): _____
 Reason: _____ Effective Date: _____
 Classification Title: _____ Job Code: _____
 Working Title: _____ Grade/Range: _____
 Time Base (example: 1.0 for full-time, 0.75 for 3/4-time, 0.5 for half-time, etc): _____
 Department Name: _____ Home Dept. ID: _____
 Fund Description (see Helpful Definitions below for more information):
 GFND CERF TRST HSE PRK LTRY STH RA OTH Unit #: _____
 Reports to Name: _____ Reports to Position #: _____

Regular Position Full-Time Single Incumbent
 Temporary Position Part-Time Pooled Position (Head Count: _____)

Ending Date (if Temporary): _____

Authorized Approver Signature: _____ Date: _____

Distribution of Labor Cost (Use this section to identify funds from which this position is to be paid)

Fund	Funding Dept ID	Program	Class	Project	Percentage to be applied

Position Management Action Form

- A Position Management Action Form (PMAF) is the means to create or modify POSITION data
 - Departments submit completed PMAFs to the appropriate signature authority
 - Signed PMAFs are then submitted to BudgetOfficeForms@csuci.edu

Position Management Action Form

- Creating New Positions or Backfilling Existing Positions
 - A Position Management Action Form (PMAF) is needed for a:
 - Vacancy
 - New temporary position

NOTE: New, regular positions are only approved through the yearly budget process

Position Management Action Form

- Updating Existing Positions
 - A Position Management Action Form (PMAF) is needed for a change in:
 - Job Code
 - Grade/Range
 - Time base
 - Home Dept ID #
 - Unit #
 - Working Title
 - Reports to Position #
 - Funding (Distribution of Labor Cost)

Position Management Action Form

- General Guidelines
 - The effective date for a position action is generally the first day of the current month (however in some situations, a retroactive date is necessary)
 - Submit PMAFs electronically to BudgetOfficeForms@csuci.edu
 - Submit PMAFs by the 25th of the month for actions to be active in the month submitted

Position Management Action Form

If you encounter an error...

ACTION:

Complete a
Payroll
Expenditure
Transfer Form



OUTCOME:

Changes the
accounting
string and/or
% distribution



IMPACT:

If one time
error, no
further action
needed

If permanent
change, must
complete a
PMAF

Questions / Feedback

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