



POSITION MANAGEMENT ACTION FORM

Budget & Planning

CONTACT INFORMATION

Requestor: _____

Requestor's Extension: _____

POSITION NUMBER

EFFECTIVE DATE

POSITION ACTION

New Position Update Data Position Reclassification In-Range/ In-Class Progression Title Change

Working Title: _____

Job Code: _____

Grade/Range: _____

Home Department #: _____

Reporting Unit #: _____

Reports to Position #: _____

Time Base (1.0 for full-time, 0.5 for half-time, etc.): _____

Fund Description: General Fund Trust Parking Housing Extended Univ
 Lottery Student Health Other Reimbursed Activities

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

Position End Date (if Temporary): _____

FUNDING / DISTRIBUTION ACTION

Provide information in the following table to identify the accounting string from which the position should be paid. All positions are set at position level funding. Appointment level funding applies to pooled positions in which the fund is different than the default position level funding. Use the template on the second page to dictate appointment level funding.

Fund	Department	Program	Class	Project	Distribution %

Funding End Date (if Temporary): _____

APPROVAL(S)

Note: Budget & Planning only needs the approval of the Division Budget Manager or equivalent position. Additional approval spaces are provided for division/department requirements, as needed.

Authorized Approver Signature: _____ Date: _____

Authorized Approver Signature: _____ Date: _____
(if needed)

Authorized Approver Signature: _____ Date: _____
(if needed)

QUICK REFERENCE GUIDE FOR THE POSITION MANAGEMENT ACTION FORM

Budget & Planning

CONTACT INFORMATION

- The primary contact should be the requestor, in the event clarification is needed.

POSITION NUMBER

- The position number is an eight (8) digit number assigned by Budget & Planning. If the position action requested is to establish a new position, leave this field blank. Budget & Planning will assign a new position number and notify the requestor of the newly assigned position number.

EFFECTIVE DATE

- The date the position action will take effect, usually the first day of the month.

POSITION ACTION

- Check only one (1) of the five (5) actions:

Requested Action	Description and Process Detail
New Position	This action creates a new position and should only be used for Permanent and Temporary positions. Budget & Planning will assign a new position number if the position was approved in the budget approval process or if there is funding justification for a temporary position. Human Resources requires an Employee Requisition Form for all new hires.
Update Data	This action signifies that one or more position changes is needed. With the exception of changes to the Funding / Distribution Action, Human Resources requires an Employee Requisition Form for all changes.
Position Reclassification	Used only for position reclassifications. If the position is not vacant, Human Resources requires an Employee Requisition Form .
In-Range/In-Class Progression	Used to elevate the range/class of a position. Budget & Planning must receive documentation from Human Resources to verify this position action. Please submit documentation with the Position Management Action Form.
Title Change	Used only when the Working Title is to be updated.

- Working Title: Title of the position, which will appear in the CI directory.
- Job Code: The four (4) digit job code per the [CSU Classification Standards](#).
- Grade/Range: The grade/range identifies an alternate range of classification when the job code has more than one assigned salary range. If there is no alternative range, the range code will be zero (0).
- Home Department #: Either a three (3) or six (6) digit number which is the home or owning department for the position.
- Reporting Unit #: A three (3) digit number which identifies the paycheck distribution protocol per the [Warrant Officers by Department](#) listing.
- Reports to Position #: The position number of the supervisor under which the position reports. Only one supervisor may be listed and that supervisor must be an Administrator.
- Time Base: The time base should reflect 1.0 for full-time, 0.5 for part-time, etc. Should be based on a standard 40 hour work week.
- Fund Description: The fund selected in this section should be the primary funding source. Please select only one fund (even though the position may be funded by multiple sources).
- Position Status: Three (3) boxes will need to be checked - Regular or Temporary position, Full-Time or Part-Time employment, and Single Incumbent or Pooled position. Pooled position head count is only for appointment level funding.
- Position End Date (if Temporary): Temporary positions must include an employment end date.

FUNDING / DISTRIBUTION ACTION

- Funding / distribution action descriptions:

Funding / Distribution Action	Description
Fund	Must be five (5) alpha/numeric digits. Required field.
Department	Either three (3) or six (6) numeric digits. Only the Division of Academic Affairs uses three (3) digit department numbers. Required field.
Program	Must be five (5) numeric digits. Optional field.
Class	Must be five (5) alpha/numeric digits. Last digit is always a letter (A, B, C, or D). Optional field.
Project	Must be five (5) alpha/numeric digits. First digit is always a letter (G, P, Q, X, or Y). Optional field.
Distribution %	Percentage can be split into multiple lines, but total must equal 100%. Required field.

- Funding End Date (if Temporary): Temporary positions must include a funding source end date. This date can differ from the employment end date, if the funding source or distribution changes.

APPROVALS

- Authorized Approver Signature: Authorized approvers are dictated by the division/department. Budget & Planning is only looking for approval of the Division Budget Manager or equivalent position.

OTHER IMPORTANT INFORMATION

- Due Date: Position Management Action Forms (PMAF) submitted by the 25th of the month will be processed in the month submitted.
- Training Guides: Visit the Budget & Planning website at <http://www.csuci.edu/budget/>
- Questions? Contact Budget & Planning at:

Phone: 805-437-2063

Email: BudgetOfficeForms@csuci.edu

Office Location: Lindero Hall