

Position Management Training

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Objectives

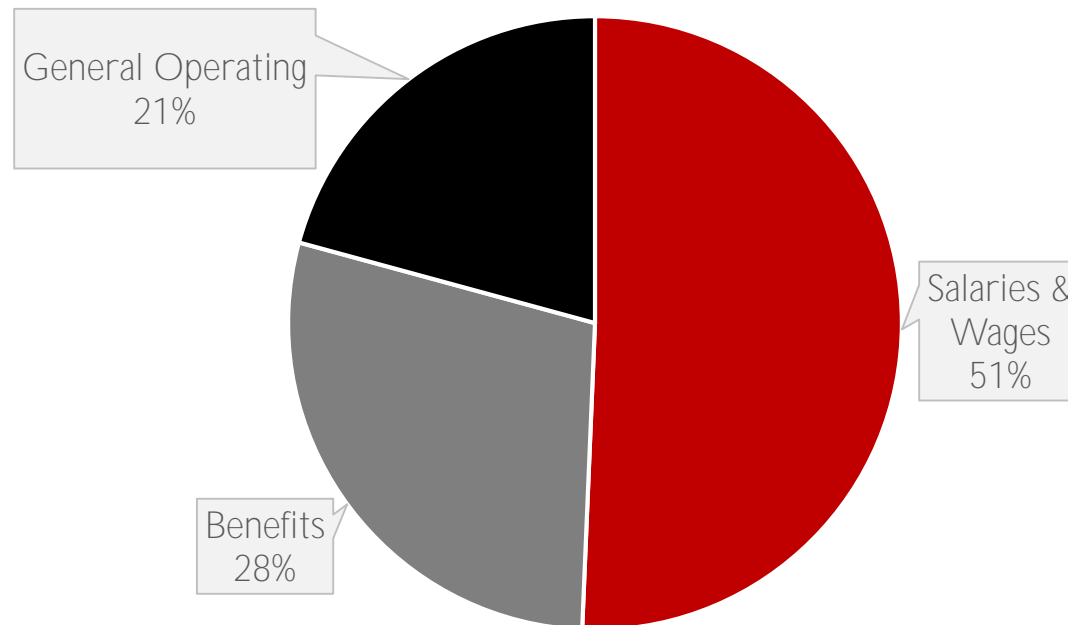
- 1) Understand what Position Management is at CSUCI and why it is important
- 2) Know when to submit a Position Management Action Form (PMAF), Employee Requisition Form (Req), and/or Payroll Expense Transfer Form
- 3) Recognize when completed forms will reflect in the LCD Dashboard of the Data Warehouse



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

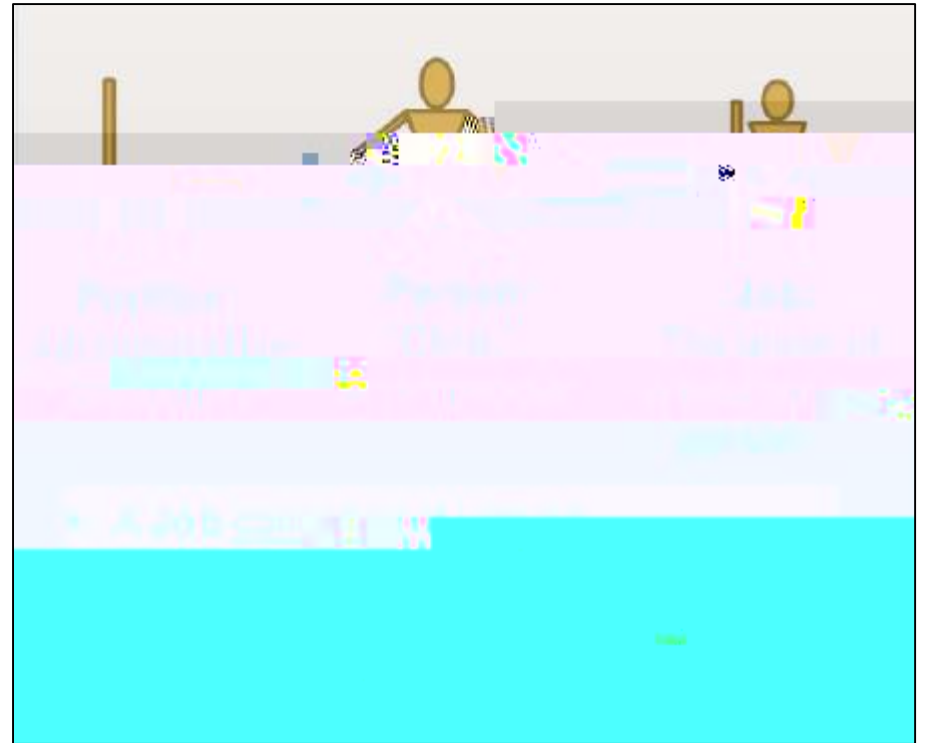


What is Position Management?

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

Budget:

Uploaded to accounting strings annually



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:

Position Type	Job Code(s)
FT Faculty Unit-Add'l Employment	2403
Special Consultants	4660
Temporary Faculty/Lecturers	2358



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



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	https://www.csuci.edu/fin	



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



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 25th of the month for a position



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





Data Warehouse: LCD Dashboard

Labor Cost Distribution (LCD) Dashboard updates monthly:

- LCD is posted no later than the 10th of each month

- Reflects all payroll transactions and position management forms submitted by the 25th of the previous month

- Provides employee-level payroll transaction detail

- Access must be requested and approved, and is granted after training is completed



Refer to our website at <https://www.csuci.edu/budget/>

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