

Position Management Training

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CI Budget & Planning - Presenters

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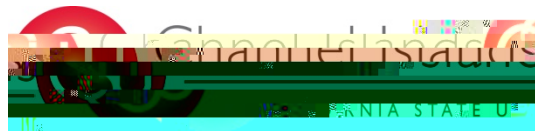
Objectives

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

What is Position Management?

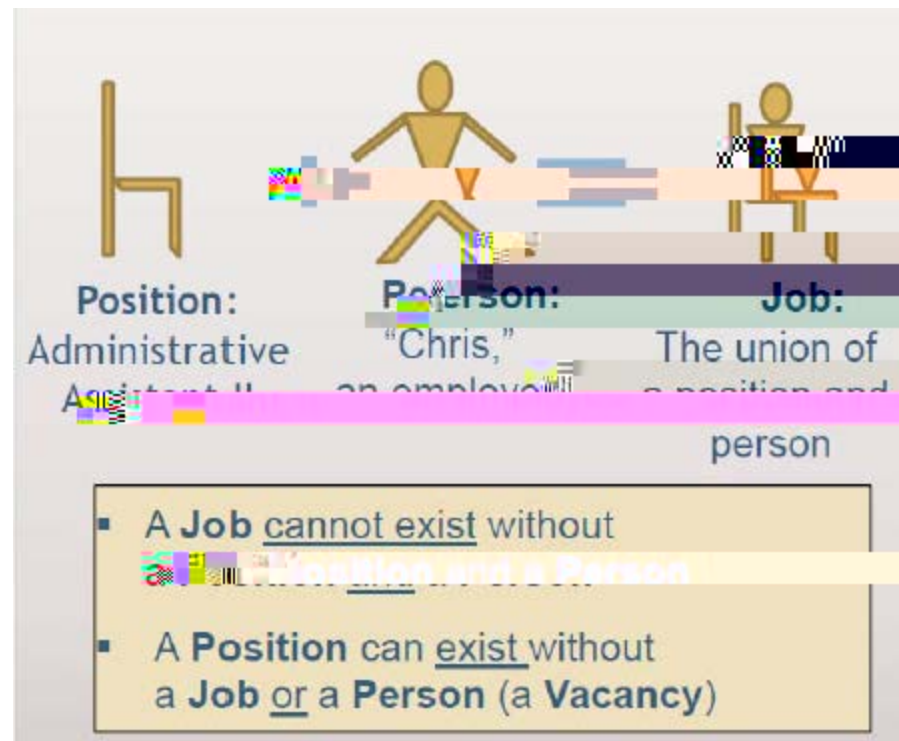


- Position Management tracks POSITIONS by assigning them POSITION NUMBERS
- A person holding a position is an incumbent



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



- Normally, only one (1) POSITIVE BDC 04810



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)

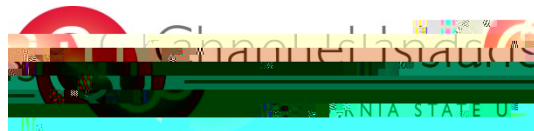




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Position Management Action Form

- A Position Management Action Form (PMAF) is the means to create or modify POSITION data
 - PMAFs are submitted electronically via DocuSign
 - <https://www.csuci.edu/vpbfa/docusign/>



Position Management Action Form

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

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

- 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 by the 25th of the month for actions to be active in the month submitted

Demonstrations

- 1) Position Management Action Form
- 2) Payroll Expenditure Transfer Form
- 3) Funding Summary USA Report in CI Records
- 4) LCD Dashboard (access for authorized users only)

Questions / Feedback

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