How to Complete the Position Action Request for all Position Actions

What is a Position Action Request Form?
A Position Action Request is the means to create or modify position management data that our campus uses in CMS-PeopleSoft HR.

Process Guide Purpose: This guide explains the data elements and various actions required to process a Position Action Request, including how the form should be completed, how it should be routed, and what happens when Budget and Finance receives it.

Process Owner: Budget and Finance is responsible for the data entry of PARs into PeopleSoft HR as agents for the Divisional Coordinators who are responsible for understanding and monitoring the data of positions within their organizational responsibility.

Form Submittal: Department’s should email completed PARs to their respective Divisional Coordinator for initial review and approval. The Divisional Coordinator should then email the approved PAR to Budget and Finance at budget@mail.sdsu.edu. Budget and Finance will not process hard copy forms - Divisional Coordinators must submit the PAR electronically.

Form: The most current version of the PAR form can be found at the Budget and Finance Website http://bfa.sdsu.edu/fm/bp/forms.htm and looks like this:

![Position Action Request Form](Image)
Completing the Form

The following information details the position actions used in PeopleSoft HR to create and maintain position management data elements and history:

<table>
<thead>
<tr>
<th>Position Action</th>
<th>Reason Code</th>
<th>Description &amp; Process Details</th>
<th>Data Elements Required on the PAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add A Position</td>
<td>NEW</td>
<td>First action required to create a new position within a department. This is required prior to submitting a recruitment requisition or hiring/transfer/promotion action ATF/STF. Prior to requesting a new position, please review existing positions to see if the position already exists and/or if there is an existing position that can be modified to accommodate the position request.</td>
<td>Provide Position #, Dept ID #, Job Code, Pool ID (leave blank for position level funding), Working Title (MPP positions only), Reports to Position #, FTE, Head Count, Grade/Range and Unit. For new MPP positions, provide (1) MPP codes and (2) a list of positions that will report to new MPP position. Note: Working Title for non-MPP positions will default based on Job Code table.</td>
</tr>
<tr>
<td>Inactivate a Position</td>
<td>INA</td>
<td>This action inactivates a position. Positions are never deleted in PeopleSoft. Positions are inactivated if they are no longer authorized for active appointments.</td>
<td>Provide Position # only. Position must be vacant.</td>
</tr>
<tr>
<td>Reactivate a Position</td>
<td>REA</td>
<td>This action changes a position status from inactive to active so that position is authorized for active appointments.</td>
<td>Provide Position # only; Position must be inactive.</td>
</tr>
<tr>
<td>R03 Non-Faculty Promotion</td>
<td>JRC</td>
<td>Change the classification of a Position resulting from a R03 non-faculty promotion. Applies to job codes 307X only.</td>
<td>Provide Position #, new Job Code, and new Grade/Range. Note: Working Title for non-MPP positions will default based on Job Code table.</td>
</tr>
<tr>
<td>Reclassify a Vacant Position</td>
<td>JRC</td>
<td>Change the classification of a vacant position. May be used when a position is vacant and the department requires that the position be reclassified prior to submitting a recruitment/requisition or hiring/transfer/promotion action ATF/STF.</td>
<td>Provide Position #, new Job Code, new Grade/Range and new Working Title. Note: Working Title for non-MPP positions will default based on Job Code table.</td>
</tr>
<tr>
<td>Temporary Job Reclassification And End Temporary Job Reclassification</td>
<td>TJR</td>
<td>This action changes the job code on a position and the class/working title/descriptions whenever HR approves a temporary reassignment and the Divisional Coordinator wants to use the current incumbent’s position (assuming there are not multiple employees hired into the same position.) Alternatively, if the employee who will be reappointed will have someone backfilling their regular appointment, a Divisional Coordinator may choose to create a new temporary position. An STF must be submitted by the Divisional Coordinator to reflect the reassignment action. For TJR: Provide Position #, new Job Code, new Grade/Range, and new Working Title (if applicable). If the position is not vacant, before the incumbent employee’s job history can be modified, an ATF/STF is required. For ETR: Provide Position #, Job Code, Grade/Range, Temporary, and new Working Title (if applicable).</td>
<td></td>
</tr>
<tr>
<td>Reorganization</td>
<td>REO</td>
<td>Used to reflect a department and/or unit (paycheck distribution) change to a position. Will also require a change in Pool ID and Reports to Position if for a department change. If the “Reports to” position or/and Dept ID changes as a result of the reorganization, the PAR will be processed after notification &amp; approval by Human Resources, which will also allow HRIS to update the incumbent’s job record.</td>
<td>Provide Position #, new Dept ID #, new Pool ID, new Reports to Position #, and/or new Unit (if applicable). If you change a Dept ID #, you must provide the Pool ID for the new Dept ID # associated with the appropriate funding account and the new Reports to Position #.</td>
</tr>
<tr>
<td>Title Change</td>
<td>TTL</td>
<td>Used in the event that a position title changes but the classification does not. <strong>MPP Positions Only</strong>. Working title defaults from job code table for all other job classifications.</td>
<td>Provide MPP Position # and new Working Title.</td>
</tr>
<tr>
<td>Update Data</td>
<td>UPD</td>
<td>To change one or more of the following data elements: Pool ID, Reports to Position, FTE, and/or Max Head Count. Note: The PAR only changes the position data – FTE changes to the employee must be requested via the ATF/STF process.</td>
<td>Provide Position # and any of the data elements that have changed. These can include: Pool ID, Reports to Position #, FTE, or/and Head Count.</td>
</tr>
<tr>
<td>Job Reclassification</td>
<td>JRC</td>
<td>Change a Position resulting from the formal reclassification process.</td>
<td>HR will complete the PAR form upon receipt and processing of ATF/STF and will forward info only PAR to B&amp;F to log and file.</td>
</tr>
<tr>
<td>In Class Progression / Range Elevation</td>
<td>ICP</td>
<td>Change a Position due to the incumbent’s In Class Progression or In Range Progression. When there is an incumbent appointed to a position, an <strong>ATF/STF is required</strong> by HR to process an ICP. HR will process ICP transaction and notify B&amp;F via PAR that ICP position action has been processed. <em>Note: UPD action reason can be used for modification to the range code via a PAR if the position is vacant.</em></td>
<td>HR will complete the PAR form upon receipt and processing of ATF/STF and will forward info only PAR to B&amp;F to log and file.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Funding Action</th>
<th>Reason Code</th>
<th>Description &amp; Process Details</th>
<th>Data Elements Required on the PAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Pool ID</td>
<td>UPD</td>
<td>Used to request a new Pool ID. Pool IDs are specific to a Department ID and are used to link a position to a funding source during the LCD process. Pool ID value will be assigned by B&amp;F.</td>
<td>Provide Position # and funding account (Department ID/ORG, Project/Activity, Class/Endeavor, Fund, and Program/Function).</td>
</tr>
<tr>
<td>Requires Position Level Funding</td>
<td>UPD</td>
<td>Used to request that funding accounts be assigned at the position level in the Department Budget Table. Used when employee is funded by multiple accounts. Employee can not be appointed to a multiple head count position.</td>
<td>Provide Position #, funding account (Department ID/ORG, Project/Activity, Class/Endeavor, Fund, and Program/Function) and percentage allocation to each account (must be a whole percent).</td>
</tr>
</tbody>
</table>
**Position Management:**

*How to complete the Position Action Request form for all Position Actions.*

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**Position Action Form**

**FIELD DESCRIPTIONS:**

**UPPER SECTION**

- **Requestor Name**: The name of the requestor who should be called if questions come up.
- **Department ID**: Requestor's Department ID (5 digit number)
- **Effective date**: The date the entry should become effective; normally the date will be the first day of the month for which payroll has not yet been processed except as required under special circumstances when the effective date needs to be pre- or post-dated to accommodate a pending hire/appointment or future action.
- **Incumbent's Name**: If the position is filled / not vacant. (Last, First M)

**Actions Requested**

Check the box of the action requested and complete all applicable information only in the yellow fields across the row.

**Field Definitions**

- **Position #**: When this field is required indicate the valid 8-digit number position number as assigned in the CMS HR system.
- **Department #**: Must be a valid department ID (5 digits) in the HR table.
- **Job Code**: The classification code as approved by Human Resources.
- **Position Pool ID**: Links the position to the funding source. A pool ID must already be established for the Department ID in the Position Pool table or a new Position Pool ID can simultaneously be requested using the same PAR by checking the New Pool ID box and completing the required fields.
- **Working Title**: All MPP positions must have specific working titles. You may leave the field blank for non-MPP positions, we will use the title from the CSU classification. Descriptions will be shown as mixed upper and lower cases. The field length for the Long Working Title/Description is limited to 30 characters including spaces.
- **Reports to Position**: The PeopleSoft Position Number will be indicated. Only one "reports to" supervisor may be indicated and must be an MPP or college Dean position number.
- **FTE = Time base**: Required for all positions to 2 decimal places, no fractions. All student job classifications will reflect an FTE of 0 (zero). The following hourly classifications will also reflect an FTE of 0 (zero): 1800 (Casual Worker), 7172 (Reader), 7930 (Per Diem Non Exempt Healthcare), 7931 (Per Diem Non Exempt Technical) and 4660 (Special Consultants). Job records will correctly denote an employee’s actual appointed timebase.
- **Max Headcount**: Indicate the maximum number of incumbents authorized for hire/appointment into the position. This field will accommodate a number from 1 to 9999.
- **Range/Grade**: Required for any positions within a job code/classification that has multiple ranges tied to a different pay scale. For example, Foundation (1), Career (2), or Expert (3) within the IT Series.
- **Unit**: Indicate the 3-digit code of the Unit. This will designate where the employee's paycheck will be routed.

**Other Important Process Information**

- In PeopleSoft, a position is established to define the authorized organizational structure of a department and facilitate the hiring process.
- The "Reports to Position" field defines the reporting relationship between positions and facilities self-service functionality within CMS-PeopleSoft HR applications (i.e. Time and Labor reporting).
• All employee appointments at SDSU, regardless of classification, require a PeopleSoft Position to be established in the PeopleSoft HR system. This must occur prior to any hiring/appointment actions and before a paycheck can be processed for any SDSU employee.

• Positions link key data elements together; the Position Pool ID or Position Level funding ties an employee to accounting chartfields that determine how his/her labor costs will be charged (distributed) in the financial system.

• Prior to completion of the PAR form, Human Resources must first classify all new staff and MPP positions. Likewise, any changes to the classification of a position require pre-approval of Academic Affairs and/or Human Resources personnel.

• All positions created in the PeopleSoft HR system are assigned an eight (8) digit Position number. This number is automatically assigned by the system as positions are created.

• Positions are never deleted from the PeopleSoft HR system. They are either modified or inactivated. This allows history to be retained on the position. Prior to requesting a new position, please review existing positions to see if the position already exists and/or if there is an existing position that can be modified to accommodate the position request.

• The SDSU Position/Incumbent report provides a summary of all position data, to include incumbents in a position, to assist departments in maintaining their position data. Access to this report varies within each campus division so please contact your divisional budget coordinator if you require access to this information.

**Position Head Count Guidelines:**

Normally, there will be one position created for each expected appointment/incumbent. However, there are certain mandatory and optional exceptions to that rule:

- **A unique position number (1:1 Position to Incumbent) is required for:**
  - All MPP Positions.
  - Most Staff positions within a department that have unique job titles and/or combinations of the following data elements: Job Code, Position Pool ID, Range/Grade, Working Title, Supervisor (reports to position), and Unit.
  - For all staff and faculty employees who are **funded from multiple accounts** that require the funding account information to be assigned at the position level.
  - **When otherwise requested by the Divisional Coordinator** (except Student Employees – all classifications, Part Time Lecturers, Teaching Associates, and Graduate Assistants.)

Note: The number of incumbents in a single head count position may temporarily exceed one due to timing of existing incumbent’s termination/retirement date and hire date of new incumbent.

- **Multiple Head Count Positions** (More than 1 Incumbent may be hired into the same position number- up to 9999) are created for:
  - All Tenure and Tenure Track Faculty Positions
  - Temporary lecturer positions in the same Department and position Pool ID (fund source).
  - Student Assistant positions in the same Department, supervisor (reports to position), and position Pool ID (funding source).
  - Work-study positions in the same Department, supervisor (reports to position) and position Pool ID (funding source).
  - Some Staff positions when all data elements are identical: Department, Job Code, Position Pool ID, Range, Job Description and Working Title, Supervisor (reports to position), and Unit indicator.
  - Miscellaneous Immediate Pay-type jobs within a department if multiple hires are anticipated and the job code and funding are the same. This includes Job Codes: 2322, 2323 - Instructional Faculty - Special Programs for Credit, Extension; 2356 – Substitute Instr Faculty; 2357 – Instr Fac Summer Session; 2362 – Demo Instr Fac; 2363 – Instr Fac Ext Non-credit; 2365 – Music Studio Instr Fac; 4660 – Special Consultant)