How to Complete the Position Action Request for all Position Actions

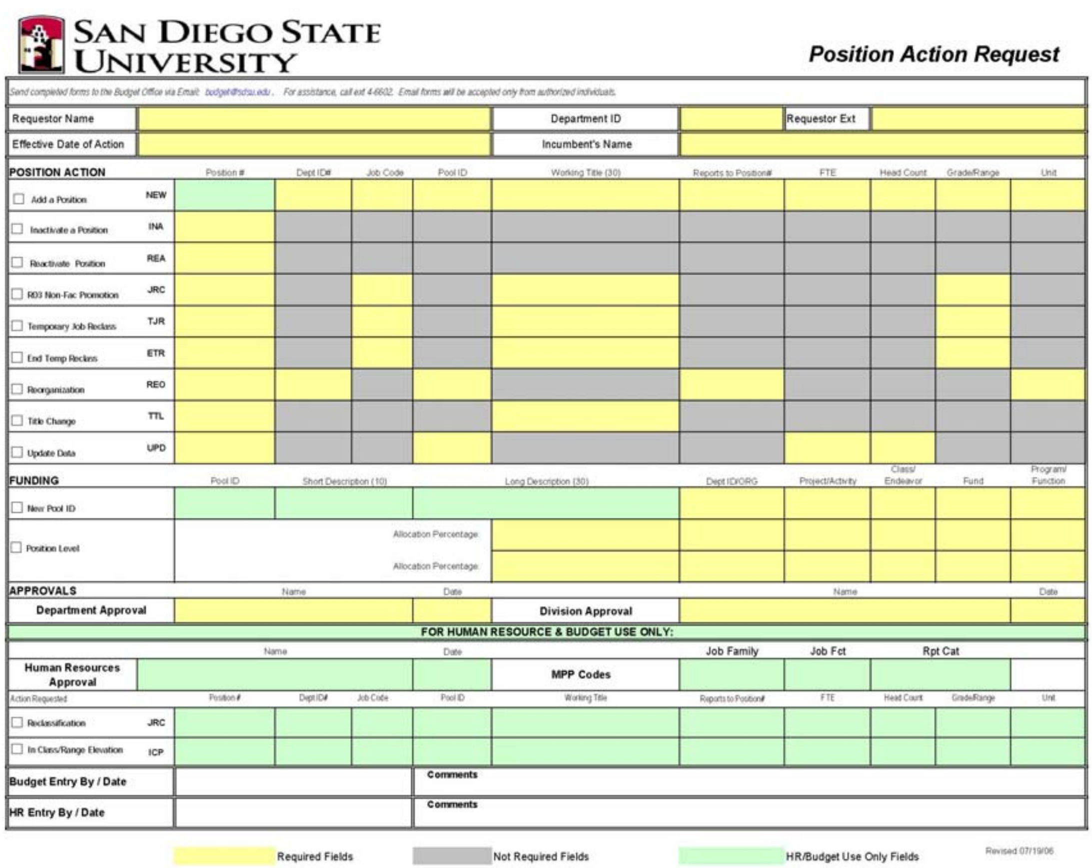
What is a Position Action Request Form?
A **Position Action Request** is the means to create or modify position management data that our campus uses in CMS-PeopleSoft HR.

***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 domain.

Form Submittal: Department's should email 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@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 Forms page *http://bfa.sdsu.edu/~budfin/forms.htm* and looks like this:



SAN DIEGO STATE UNIVERSITY

Position Action Request

Send completed forms to the Budget Office via Email: budget@sdsu.edu . For assistance, call ext 4-6602. Email forms will be accepted only from authorized individuals.

Requestor Name		Department ID		Requestor Ext	
Effective Date of Action		Incumbent's Name			

POSITION ACTION		Position #	Dept ID#	Job Code	Pool ID	Working Title (30)	Reports to Position#	FTE	Head Count	Grade/Range	Unit
☐ Add a Position	NEW										
☐ Inactivate a Position	INA										
☐ Reactivate Position	REA										
☐ R03 Non-Fac Promotion	JRC										
☐ Temporary Job Reclass	TJR										
☐ End Temp Reclass	ETR										
☐ Reorganization	REO										
☐ Title Change	TTL										
☐ Update Data	UPD										

FUNDING	Pool ID	Short Description (10)	Long Description (30)	Dept ID/ORG	Project/Activity	Class/ Endeavor	Fund	Program/ Function
☐ New Pool ID								
☐ Position Level		Allocation Percentage:						
		Allocation Percentage:						

APPROVALS	Name	Date		Name	Date
Department Approval			Division Approval		

FOR HUMAN RESOURCE & BUDGET USE ONLY:

	Name	Date		Job Family	Job Fct	Rpt Cat
Human Resources Approval			MPP Codes			

Action Requested		Position #	Dept ID#	Job Code	Pool ID	Working Title	Reports to Position#	FTE	Head Count	Grade/Range	Unit
☐ Reclassification	JRC										
☐ In Class/Range Elevation	ICP										

Budget Entry By / Date		Comments
HR Entry By / Date		Comments

Required Fields | Not Required Fields | HR/Budget Use Only Fields

Revised 07/19/06

How to Complete the Form?

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

PeopleSoft Action	Reason Code	Description & Process Details	Data Elements Required on the PAR
Add A Position	*NEW*	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.	ALL
Inactivate A Position	*INA*	This action inactivates a position. Positions are never deleted in PeopleSoft. Positions are inactivated if they are no longer authorized for active appointments.	Provide Position # only; position must be vacant.
Reactivate a Position	*REA*	This action changes a position status from inactive to active.	Provide Position # only; position must be *inactive*.
Job Reclassification	*JRC*	Change a Position resulting from the formal reclassification process. INITIATED BY HUMAN RESOURCES ONLY	Provide Position #, new Job Code, new Grade/Range and new Working Title (if applicable). MPP position must have a specific working title.
Update Data	*UPD*	To change one or more of the following data elements: Pool ID, 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.	Provide Position # and any of the data elements that have changed. These can include: Pool ID, FTE, or/and Max Head Count.
Working Title Change	*TTL*	Used in the event that a position title changes but the classification does not.	Provide Position # and new Working Title.
Change a Position due to a Temporary (Reclass) Reassignment <u>and</u> End Temporary (Reclass) Reassignment	*TJR* *ETR*	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).
Reorganization	*REO*	Used to reflect a department, reporting authority, pool ID and/or unit tied as a reorganization action in PeopleSoft. If the unit changes only, we still track these data changes as a reorganization action. An ATF/STF is required for any reorganization that requires a unit change because these must be captured in the PIMS Payroll system. If the "Reports to" position or/and Dept ID changes as a result of the reorganization, the PAR will be processed after notification & approval by Human Resources, which will also allow HRIS to update the incumbent's job record.	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# and the appropriate funding account.

PeopleSoft Action	Reason Code	Description & Process Details	Data Elements Required on the PAR
In Class Progression/Range Elevation	*ICP*	Change a Position due to a Staff position's *In Class Progression or In Range Progression.* Budget and Finance can process the changes to the range code via a PAR if the position is vacant. If there is an incumbent appointed to this position, an ATF/STF is required and HR will notify Budget and Finance when the changes to the range code are approved.	Provide Position #, specific Working Title, and Grade/Range (if applicable). MPP position must have a specific working title. Working Title must be within the range of Job Title.
New Pool ID	*N/A*	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.	Provide Department ID and funding account information (Department ID/Organization, Project/Activity, Class/Endeavor, Fund, and Program/Function).
Requires Position Level Funding	*N/A*	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.	Provide funding account information (Department ID/Organization, Project/Activity, Class/Endeavor, Fund, and Program/Function) and percentage allocation to each account.

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 the PAR is 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. If this field is left 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.

- *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.

- 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 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.

Miscellaneous 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, and Unit.
- For staff and faculty employees who are funded from multiple accounts that require the 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.)*

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 and position Pool ID (funding source).
- Work-study positions in the same Department 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, Attendance Unit, Budgeted Position 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)