POSITION MANAGEMENT

STANDARD OPERATION PROCEDURES

PURPOSE, GENERAL GUIDELINES, AND APPLICABILITY

CONTENTS

WHAT IS POSITION MANAGEMENT?

Position Management is an HR SOLAR module designed to describe the Human Resources structure of the university through the management of the employment data for each position. Each position in HR SOLAR contains the key attributes of job code, job title, type of employment (regular or temporary), and standard hours. Positions are connected to each other through hierarchal reporting relationships and linked to departments to create the organizational structure of the university. Employees are assigned to positions within the structure. Position information provides a snapshot in time of the organization, regardless of incumbents.

On campus, the term *Position Management* describes the activities that affect position information, either through the creation of a new position, a change to an existing position, or the inactivation of a position. Position Management also encompasses the impact on an employee when the position they are occupying is changed.

WHAT IS A POSITION?

A position is a distinct "slot" within the organization of the university that is defined by such elements as department, job, location, status. Each department has an inventory of positions that describe their organizational structure. Each position is represented by a unique position number.

A position exists regardless of whether a person is assigned to the position or the position is vacant. For example: a department may have 15 positions, whereas the department may have only 12 employees at this time. In this example, the department has three vacant positions.

The status of the position is also separate from the incumbent status. For example, an employee may be appointed temporarily to a regular position or, in rare instances, an employee with permanent status may be appointed to a temporary position.

WHY IS POSITION MANAGEMENT USED?

By organization of positions through a structure, Position Management provides an administrative tool to identify the historical and current structure, measure trends, and provide workforce analyses for planning and budgeting.

WHEN TO USE POSITION MANAGEMENT?

All employment instances are managed within Position Management. A position is required to maintain the organizational structure and to identify its placement within the university.

TRANSACTIONS THAT IMPACT POSITION MANAGEMENT

This is a generalized listing of the categories of transactions that impact Position Management. Specific transactions with detailed procedures are included later in this document.

- Creating New Positions
- Updating Positions
- Department ID Change
- Reporting Relationship Change
- Regular/Temporary Status Change
- Time Base Change
- Working Title Change
- Classification Change
- Freeze/Unfreeze Position
- Inactivate Position
- Headcount Change

ADMINISTRATIVE PROCESS:

Position information is updated in Human Resources through completion of the Action Request Form (ARF) for Staff and Students, or Personnel Action Request (PAR) for Faculty (See Appendix 3 and 4). Similar to employee job records, all activity related to positions is effective-dated. This allows the university to maintain a historical record of changes to positions and to the organizational structure.

This document is intended as a process guideline. The impact of the requested change(s) to an incumbent, department structure, and budget should be considered carefully. Review of the relevant collective bargaining agreement and/or consultation with Human Resources is recommended.

Labor Cost Distribution (LCD) is an important aspect of Position Management as it helps to accurately track payroll costs. Payroll costs are allocated to distinct chartfields and allow us to establish records of how payroll expenses are distributed. When payroll costs, through LCD, are allocated to their respective chartfields, journal lines are generated and exported to the general ledger. The goal of this process is to transmit payroll expenditure journal information from module to module (HCM module to CFS Finance).

It is important to understand that almost any change to a position will create a change in LCD. While these changes might be considered behind the scenes and technical in nature, it is important to ensure that we understand, at least on the surface, how position data, generally by department ID, is used by the LCD process to locate the correct record in order to assign the most recent funding in the tracking process.

Funding information (funding strips), used to distribute payroll expenses, is stored in the Department Budget Table (DBT) by department ID. When changes are necessary to reallocate the payroll costs of a position to another fund, the funding strip is updated by the designated end user via Manager's Workbench. However, in order for an end user to successfully make funding strip changes in Manager's Workbench, the department ID in DBT and Position Management must match. It is essential to remember that transactions in Position Management where positions are moved between departments, cause these two tables to become out of synch, and disallow end users from making desired funding changes since the DBT is not updated. This is when a manual intervention by Financial Services business analysts is necessary to re-synch the DBT to Position Management, which then allows the necessary funding changes to be made successfully.

Important: In the event of a position change in which the position has an incumbent; the attributes of the incumbent's job record will be updated unless an exception has been identified as appropriate. If a position change includes a department or classification change, and that position has a current incumbent, it may be considered a reassignment. The relevant collective bargaining agreement should be reviewed to ensure requisite notification timelines have been met.

1. CREATE NEW POSITION

New Position

- A new position is established when new or repurposed funds have been allocated for a job at the university.
- Position numbers are automatically assigned by Human Resources.

EXAMPLE: A NEW COLLEGE DEPARTMENT WAS CREATED ESTABLISHING A NEED FOR TWO NEW STAFF POSITIONS, THREE STUDENTS, SEVERAL TENURE TRACK FACULTY AND TEMPORARY FACULTY; THESE POSITIONS WERE NOT REASSIGNED FROM OTHER DEPARTMENTS.

STAFF

Steps

1. Create a job opening in Recruiting Solutions
2. Check the "new" box to indicate new position
3. Attach a position description and any other documentation, as required
4. HR will review and make a classification determination
5. HR will create a new position number

FACULTY – Tenure Track (one to one position)

Steps

1. Complete a Personnel Action Request (PAR) form for each position (when needed for a new faculty member)
2. Indicate "New" in the Position Number Field
3. Indicate the position attributes (Job Code, Time Base, Reports To, etc.)
4. HR will create a new position number

FACULTY – Temporary Faculty (Pooled Position) and STUDENTS – (Pooled Position)

Refer to section on Pooled Positions.

Considerations: If a position within the university has been moved to a new department, an update to position is generally made as outlined in the "Reassignments" section of this document.

2. UPDATE TO POSITION - VACANT

- Updates to a position can be made to a vacant position to reflect departmental needs. These changes may include any key attributes of the position that have been made since the position was vacated. Some examples include time base, regular or temporary position type, job code, etc.

EXAMPLE: UPON THE RETIREMENT OF AN ADMINISTRATIVE SUPPORT ASSISTANT, THE DIVISION DETERMINED THAT THE POSITION SHOULD BE RECRUITED AND FILLED AS AN ADMINISTRATIVE SUPPORT COORDINATOR TO REFLECT INCREASED RESPONSIBILITIES OF THE POSITION.

STAFF

Steps

1. Create a job opening in Recruiting Solutions
2. Check the "needs review" box to indicate a classification review request
3. Attach an updated position description and any other documentation, as required
4. HR will review and make a classification determination
5. HR will update Position Management accordingly, if changes are made

- Updates to Faculty – Tenure Track vacant position processing is completed by HR when a new faculty member is assigned based on a Personnel Action Request (PAR).

FACULTY

Steps

1. Review Department Position Roster in Managers Workbench
2. Choose a vacant position number and enter on the Personnel Action Request (PAR)
3. HR will update Position Management accordingly, if changes are made

- Updates to vacant pooled positions can be submitted on Action Request Form (ARF). *Refer to section on Pooled Positions.*

3. UPDATE TO POSITION – WITH INCUMBENT

Many updates can be made to a position with an active incumbent.

DEPT ID CHANGE (NO JOB CODE CHANGE)

- Position is reassigned from one department to another, within the same division.

EXAMPLE: THE INFORMATION TECHNOLOGY COORDINATOR IN THE DEAN'S OFFICE IS REASSIGNED TO AN ACADEMIC DEPARTMENT.

STAFF

Steps

1. Complete Action Request Form (ARF)
2. Check *Reassignment* box as well as the *Department ID* change box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive) and end date, if applicable
4. Complete *Change To* section
5. Obtain necessary approvals and submit to HR
6. HR will update Position Management accordingly

Considerations:

1. Need to consider whether current staff reporting to the incumbent and/or that position are also moving to the new department and remain reporting to the position or staying in the current department and reporting to a new supervisor.

2. Refer to the section on *Pooled Positions* for information when there are multiple incumbents in one position.

REPORTING RELATIONSHIP CHANGE (NO JOB CODE CHANGE)

- Position now reports to another position within the organizational structure.

EXAMPLE: THE REPORTING RELATIONSHIPS HAVE CHANGED AND THE BUDGET COORDINATOR IN AN ACADEMIC DEPARTMENT WILL NOW REPORT TO THE COLLEGE MANAGER OF ACADEMIC RESOURCES RATHER THAN THE DEPARTMENT CHAIR.

STAFF

Steps

1. Complete Action Request Form (ARF)
2. Check *Reassignment* box as well as the *Reports to* change box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive) and end date, if applicable
4. Complete *Change To* section
5. Obtain necessary approvals and submit to HR
6. HR will update Position Management accordingly

Considerations:

1. Need to consider whether current staff reporting to the position are also moving to a new department, if applicable, and will remain reporting to the position or will report to a new supervisor.

2. Faculty generally report to the Department Chair. In a few cases, some faculty members are assigned as Program Coordinators and may have other faculty reporting to them. Submit a PAR for each affected faculty member.

3. Pooled Positions – see section on *Pooled Positions.*

REGULAR/TEMPORARY STATUS CHANGE

- When a request is made to change the status of a position with an incumbent from temporary to regular status (no change in job), the position and job record regular/temporary statuses are updated. Please note that the employee in a regular position may be temporary, probationary, or permanent.

- Permanent funding has been established and the Temporary Department Coordinator position is changed to regular.

EXAMPLE: THE EMPLOYEE WAS NEWLY RECRUITED TO THE POSITION; THE EMPLOYEE IS DESIGNATED AS PROBATIONARY.

STAFF

Steps

1. Complete Action Request Form (ARF)
2. Check *Temporary to Probationary* box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive)
4. Obtain necessary approvals and submit to HR
5. HR will update Position Management accordingly

Note: Position regular/temporary status identifies position status and NOT employee status.

TEMPORARY TO PERMANENT CHANGE

- When a staff employee with a temporary status is given permanent status as a result of provisions in the collective bargaining agreement, the position and job record may need to be updated.

EXAMPLE: TEMPORARY CUSTODIAL EMPLOYEE WORKS FOUR YEARS IN SAME TEMPORARY POSITION AND ATTAINS PERMANENCY BASED UPON THE CONTRACT.

STAFF

- Internal HR process based upon collectively-bargained date criteria awarding permanent status to temporary employees. If position is not already regular, HR updates the position to reflect new position status as well as the employee job record.

TIME BASE CHANGE (STANDARD HOURS, FULL/PART-TIME)

- Permanent change to the time base of a position, including hourly to salaried and part-time to full-time, require an update to position data. Impacts to standard hours and full- and part-time fields should be updated. Temporary changes to time base will be reflected only on the job record.

EXAMPLE: DEPARTMENT REQUESTS TO CHANGE STANDARD HOURS FROM 30 HOURS PER WEEK TO 40 HOURS PER WEEK, I.E. TIME BASE FROM .75 TO 1.0 (FULL TIME).

STAFF

Steps

1. Complete Action Request Form (ARF)
2. Check *Time Base* change box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive) and end date, if applicable
4. Complete *Change To* section
5. Obtain necessary approvals and submit to HR
6. HR will update Position Management accordingly

Considerations: A decrease in a position's time base for a probationary or permanent employee requires consultation with Human Resources and generally requires processing as a leave of absence or partial leave of absence.

FACULTY

- Changes in time base for tenured and tenure-track faculty are submitted on a Personnel Action Request (PAR). Position Management will be updated automatically by HR. Temporary faculty are usually changed in the Part Time Faculty module. A PAR is required for temporary faculty moving to or from full time status.

WORKING TITLE CHANGE

- Change in working title

EXAMPLE: REQUEST TO CHANGE EMPLOYEE'S WORKING TITLE FROM: ADMINISTRATIVE SUPPORT ASSISTANT TO MUSIC DEPARTMENT ASSISTANT.

STAFF

Steps

1. Complete Action Request Form (ARF)
2. Check *Working Title* change box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive)
4. Complete *Change To* section. Working title will be abbreviated if it exceeds 30 characters
5. Obtain necessary approvals and submit to HR
6. HR will update Position Management accordingly

Note: Title changes are rarely made to **faculty and pooled positions** because of the similar nature of the jobs. Changes for specific, unusual situations should be made in consultation with the Position Management Analyst and will be processed as above after appropriate approvals.

CLASSIFICATION OR IN-CLASS PROGRESSION CHANGE (RECLASSIFICATION)

- As a result of a classification review, the job code (reclassification) or level (in-class progression with the same job code) of a position is increased, the position is updated.

EXAMPLE: EMPLOYEE IS RECLASSIFIED FROM SSP II TO SSP III FOLLOWING A CLASSIFICATION REVIEW CONDUCTED BY HUMAN RESOURCES; OR EMPLOYEE RECEIVES A LEVEL INCREASE FROM ASA I TO ASA II FOLLOWING A HUMAN RESOURCES REVIEW FOR IN-CLASS PROGRESSION.

STAFF

Steps

1. Submit Position Description Form indicating request for classification review
2. Review will be conducted by Manager, Classification and Compensation
3. If review results in classification job code and/or level change, the Manager, Classification and Compensation, will complete appropriate form to convey changes to Position Management as well as the Job Data record

FACULTY

- Faculty changes to level (rank) are handled by Faculty Affairs and HR which makes appropriate changes in Position Management and Job Data after receipt of the information.

4. UPDATE JOB RECORD FOR TEMPORARY NEED – POSITION OVERRIDE

In most cases, the attributes of a position record (such as: job code, job title, type of employment, (regular or temporary), and standard hours) are matched on the record of the employee occupying the position. However, in rare cases based on organizational need, the employee information will not match the position information. This is referred to as Position Override.

TEMPORARY REASSIGNMENT TO A HIGHER CLASSIFICATION, EXISTING POSITION

- When a need exists to elevate the classification of an employee to meet a temporary need, the position is not updated. These changes are reflected on the incumbent employee's job record through job code and/or salary.

  EXAMPLE: EMPLOYEE IS ASSUMING HIGHER CLASSIFICATION/GRADE LEVEL TEMPORARILY TO WORK ON A SPECIAL PROJECT. EMPLOYEE WILL RESUME PREVIOUS SCOPE OF WORK FOLLOWING COMPLETION OF THE PROJECT.

  STAFF

  Steps

  1. Complete Action Request Form (ARF)
  2. Check *Reassignment* box
  3. Provide effective date (should be beginning of pay period and, preferably, not retroactive) and end date
  4. Complete *Change To* section
  5. Obtain necessary approvals and submit to HR
  6. HR will update employee job data

POSITIONS IN TRAINING SERIES

- For certain job families, such as the SSP series, an employee is hired at a lower classification in the family, but the position is budgeted at a higher classification for future anticipated increases. In these instances, the position is created at the highest anticipated level consistent with available funding and the information is overridden on the job at the employee level consistent with their current classification.

  EXAMPLE: EMPLOYEE IS HIRED AS A SSPIA TO FILL A SSPII POSITION. ASSUMING NORMAL PROGRESS, THE EMPLOYEE IS EXPECTED TO PROMOTE TO THE SSPII LEVEL WITHIN 24 MONTHS.

  STAFF

  Steps

  1. Create a job opening in Recruiting Solutions
  2. Check the "needs review" box to indicate a classification review request
  3. Attach an updated position description, training plan and any other document as required
  4. HR will review and make a classification determination
  5. The job will be posted at the trainee level with language to indicate promotion to the next level(s) as appropriate

5. ASSIGN EMPLOYEE TO ANOTHER POSITION

Outside of the recruitment process, the transfer of an employee to another position is generally considered a reassignment. Employee may be reassigned, permanently or temporarily, to another position in the same classification and skill level as the employee's existing classification and skill level, or temporarily to a higher classification and skill level.

For temporary reassignments to a higher classification or skill level, the employee must meet the minimum qualifications of the higher classification and receive an appropriate increase upon appointment into higher classification pursuant to the relevant CBA (Collective Bargaining Agreement).

REASSIGNMENT TO A NEW POSITION

- If employee is reassigned to a new position, see "New Position" procedure outlined in this document.

STAFF

EXAMPLE: NEW DEPARTMENT IS CREATED AND EMPLOYEE IS REASSIGNED TO FILL NEW CLERICAL VACANCY IN DEPARTMENT.

REASSIGNMENT TO A VACANT POSITION

- If employee is assigned to vacant position on temporary or permanent basis.

EXAMPLE: CUSTODIAL EMPLOYEE IS TEMPORARILY REASSIGNED TO BACKFILL VACANT LEAD CUSTODIAN POSITION.

STAFF

Steps

1. Complete Action Request Form (ARF)
2. Check *Reassignment* box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive) and end date, if applicable
4. Complete *Change To* section
5. Obtain necessary approvals and submit to HR
6. HR will update Position Management accordingly

Considerations: If position status (Regular/Temporary) is different from employee status, the job record may be overridden to reflect the employment status, i.e. temporary or regular. For example, if a permanent employee is temporarily backfilling a permanent vacancy pending recruitment, the job record is updated to indicate the employee is (only) "temporary" in the "regular" position.

6. POOLED POSITIONS

Positions normally filled by temporary employees that share the same key attributes, including job code (classification and level), department ID, standard hours, funding, and reporting relationship may be managed under one position. When one position is used for multiple incumbents in this manner, it is considered to be a pooled position. Non-salaried temporary staff, student assistants, and special pay jobs may be pooled. Salaried part-time faculty, graduate assistants and teaching assistants may be pooled. Examples of job codes commonly used as a pooled position can be found in Appendix (2).

NOTE: When making choices about pooled positions, please consult with your administration to ensure practices followed are consistent with the department.

CREATE POOLED POSITION

- Create Pooled Position, generally for special pay, student assistant, part-time faculty, or hourly staff positions
- Impacts maximum headcount field
- Impacts reporting on over allocated positions
- Impacts reporting on Full-Time vs. Part-Time and Standard Hours/FTE

Steps

1. Complete Action Request Form (ARF)
2. Indicate the position attributes (Job Code, Dept ID, Reports To, etc.) on **Current Information** section
3. Check *New Position* box as well as the *Pool* box
4. Provide effective date (should be beginning of pay period and, preferably, not retroactive)
5. Provide headcount

Note: Time base on most pooled positions is set up with defaults that are standard for most Job Codes (Appendix 2). However, the time base for certain pooled positions may be calculated based upon the average time base of all the incumbents in that pooled position.

MAXIMUM HEADCOUNT CHANGE

- Increase or decrease of headcount for pooled positions
- Impacts maximum headcount field
- Impacts reporting on over allocated positions
- Maximum headcount should reflect as close to actual count as expected

Steps

1. Complete Action Request Form (ARF)
2. Check *Pool Position Headcount* box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive)
4. Check *Increase To/Decrease To* box and provide headcount

Considerations: The process to reorganize a whole department is covered on the HR Website under Administrative Processes. http://www-admn.csun.edu/ohrs/process/. Reorganization of pooled positions requires close coordination with the Position Management Analyst and HR Operations, particularly when there are many incumbents.

7. INACTIVATION OR FREEZING OF A POSITION

When a determination has been made that a position will not be filled, it may be inactivated or frozen.

INACTIVATE A POSITION

- Position is no longer required or will no longer be used.

EXAMPLE: DEPARTMENT DOWNSIZING RESULTS IN ELIMINATION OF VACANT POSITION FOR BALANCE OF FISCAL YEAR.

Considerations: Ensure position is vacant before requesting inactivation.

Steps

1. Complete Action Request Form (ARF)
2. Check *Inactivate* box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive)

FREEZE A POSITION

- Position remains budgeted, but will not be filled for an extended period of time. Position may be unfrozen in the future, as needed, through the Action Request Form (ARF).

EXAMPLE: DEPARTMENT IS CONSIDERING ORGANIZATIONAL NEEDS AND WANTS TO DELAY RECRUITMENT ACTIVITIES FOR THE NEXT SIX MONTHS.

Considerations: Ensure position is vacant before requesting freeze of a position.

Steps

1. Complete Action Request Form (ARF)
2. Check *Freeze/Unfreeze* box
3. Provide effective date (should be beginning of pay period and, preferably, not retroactive)

APPENDIX (1) POSITION MANAGEMENT GLOSSARY OF TERMS

FLSA Status:	Indicates whether a job is exempt or non-exempt from overtime according to the Fair Labor Standards Act. All employees associated with a particular job will receive that job's FLSA Status.
Full/Part-time:	Indicates full-time employment (standard hours of forty per work week) vs. part-time employment (less than forty standard hours per work week).
Grade:	Identifies an alternate range for a classification when there is more than one salary range assigned. Additionally, certain classifications have multiple grades based on skill levels. For faculty, grade typically denotes rank.
Incumbent:	Employee occupying a given position.
Job Code:	Four (4) digit code that identifies the job classification of the position.
Max Head Count:	The maximum number of incumbents authorized for appointment into the position.
One-to-one position:	Position with only one possible incumbent.
Over allocated:	When the number of incumbents exceeds the maximum headcount of the position.
Pooled position:	A position in which one or more employee(s) may be assigned.
Regular/Temporary:	Identifies the position status and NOT the funding designation. Indicates whether the position will be Regular (part of the planned permanent organizational structure) or Temporary. (Sometimes referred to as "Reg/Temp")
Reports to:	Used to establish reporting relationships within the organization. This field lists the position number to whom the incumbent reports.
Salary Admin Plan:	Plan assigned to employees sharing the same salary attributes for specific job codes, including minimum and maximum salary ranges, FLSA status, overtime and shift eligibility, and occupational indexing.
Standard Hours:	Number of hours an employee works in a standard week. For those paid hourly/intermittent employees, the standard hours should reflect the average over an annualized period.
Working Title:	Descriptive title of position based on the specific work performed.
Special Pay:	Employees paid through job codes 2322, Instructional Faculty, Special Programs; 2323, Instructional Faculty, Extension Credit; 2356, Substitute Instructional Faculty; 2363, Instructional Faculty, Extension Non-credit; or 4660, Special Consultant. Also referred to as Immediate Pay in HR SOLAR.

APPENDIX (2) EXAMPLES OF COMMON JOB CODES USED WITH POOLED POSITIONS

Job Code	Job Title/Standardized Position Hrs if applicable
1150	Instructional Student Assistant (On-Campus)/4.0
1151	Instructional Student Assistant (On-Campus Work Study)/4.0
1152	Instructional Student Assistant (Off- Campus)/4.0
1153	Instructional Student Assistant (Off-Campus Work Study)/4.0
1800	Casual Worker/8.0 but may be updated to reflect overall weekly average of incumbents
1868	Student Assistant Non-Resident Alien/4.0
1870	Student Assistant/4.0
1871	Student Trnee, On-Campus Work Study/4.0
1872	Student Trnee, Off-Campus Work Study/4.0
1874	Taxable Student Assistant/4.0
2322	Instructional Faculty, Special Program-For Credit/.01
2323	Instructional Faculty, Extension-For Credit/.01
2325	Graduate Assistant Monthly/8.0
2353	Teaching Associate 12 Mo/8.0
2354	Teaching Associate AY/8.0
2355	Graduate Assistant/8.0
2356	Substitute Instructional Faculty/.01
2357	Instructional Faculty, Summer Session/.01
2358	Lecturer AY/8.0
2359	Lecturer 12 Mo/8.0
2363	Instructional Faculty, Extension-Non Credit/.01
2457	Instructional Faculty, Summer Session State Supported/.01
4660	Special Consultant/.01
7170	Interpreter/Transliterator I /30.0
7193	Hrly Intrprt/Rltmecap/Catscrbr/8.0

APPENDIX (3) ACTION REQUEST FORM INSTRUCTIONS AND FORM (ARF)

Use this form to request a status, additional compensation or other miscellaneous change to the position or employee or both. Both indicates that a position is currently occupied and the action will affect both the position and employee.

- Check the **"Change To"** box that describes whether the requested change is to the position, the employee or both.
- Provide applicable information under "**Employee/Position Information**" section at the top of the form. NOTE: this information pertains to the CURRENT status, not the requested change.
- Check the appropriate box(es) under "**Action Requested"** and complete requested information. Definitions for unique fields can be found by scrolling over the field name.

Change (Status Change section):

- Reassignment is movement of a current employee to a different position (temporary if to a higher classification), pay plan (e.g., 12/12 to 10/12) or a department without conducting a formal recruitment. A reassignment may or may not result in a salary change.
- Temporary to Probationary is a movement of an employee from temporary appointment status to a probationary appointment status. Once the employee has served the probationary period satisfactorily, the employee will be granted permanent status.
- Time Base Change is temporary or permanent increase to an employee time base or a decrease to an employee time base if the employee has a temporary appointment status. An employee with probationary or permanent status may request a temporary decrease to employee time base and is requested through the Leave of Absence Request form. As changes in time base often affect employee benefits, it should be carefully considered and approved as appropriate. For time base that is less than full time, it is defined as an estimate of the average annual hours an employee is expected to work.
- The policies and conditions governing specific changes in employee status are contained in various sources including collective bargaining agreements.
- If you have any questions, please consult with the Manager, Compensation and Classification.

Compensation (Comp section):

- Stipend. Applies to all employees represented by Collective Bargaining Units 2,5,7, and 9 and Unit 8. Provisions are outlined in the collective bargaining agreements.
- Bonus. Applies to all employees represented by Collective Bargaining Units 2,5,7, and 9 and Unit 4. Provisions are outlined in the collective bargaining agreements.
- Justification or additional documentation may be required.
- If you have any questions, please consult with the Manager, Compensation and Classification.
- In-range progressions and classification review requests are submitted through the In-Range Progression Request Form and Position Description Form - Staff

Miscellaneous (Misc section):

- Working Title Change. Justification or additional documentation may be required.
- Change in Work Schedule. If you have any questions, please consult with the Business Analyst.
- Other. Use to request changes not already identified on this form.

Position/Assignment Information:

- Inactivate Position is used when a position is no longer required or will no longer be used.
- Freeze Position is used when a position remains budgeted, but will not be filled for an extended period of time.
- New Position is used to create a one-to-one or pool position. Headcount for pool position is required. Most one-to-one staff positions will be created through Recruiting Solutions.
- Pool Position Headcount is used to increase or decrease the current headcount for established pool position.

Action Request Form - State

Office of Human Resources **California State University, Northridge**

CHANGE TO: ☐ **Position** ☐ **Employee** ☐ **Both**

Current Information

EMPLOYEE / POSITION INFORMATION (CURRENT STATUS)

Employee ID:	Current/Previous Incumbent:	Position Number:	Reports To Name:	Reports To Position No.:
Department ID:	Department:	Job Code:	Job Title:	Grade/Level:
Working Title:			Time Base: %	☐ Intermittent
Type: ☐ Emergency Hire ☐ Permanent ☐ Probationary ☐ MPP			☐ Temporary-Exp Date:	Renewable: ☐ Y ☐ N

ACTION REQUESTED

	Effective Date	End Date (if applicable)	**Change To:** (if applicable)
Status Change			
☐ **Reassignment** ☐ **Reports To Change** ☐ **Department ID Change**			**Dept ID:** **Dept:** **Job Code:** **Job Title:** **Pos No.:** **Time Base:** **Reports to Name:** **Reports to Position No:**
☐ **Temporary to Probationary**			
☐ **Time Base Change**			**Time Base:**
Com			
☐ **Stipend**			
☐ **Bonus**			
Miscellaneous			
☐ **Working Title Change**			
☐ **Change in Work Schedule** ☐ **Regular to Alternate** ☐ **Alternate to Regular** ☐ **Alternate to Alternate**			**Time Base:** **Enter Schedule Here:**
☐ **Other –** **Explain:**			

POSITION/ASSIGNMENT INFORMATION (Complete all new/changed information)

☐ **Inactivate**			
☐ **Freeze** ☐ **Unfreeze**			
☐ **New Position** ☐ **Pool** ☐ **One-to-One**			**Headcount of:**
☐ **Pool Position Headcount**			☐ **Increase to:** ☐ **Decrease to:**

CONTACT INFORMATION

Name: **Extension:**

SIGNATURES/APPROVALS

Name of Supervisor/Department Chair: **PRINT**	Signature:	Date:	EXT:
Name of Director/Dean/MAR/Fin Mgr: **PRINT**	Signature:	Date:	EXT:
Name of Vice President/President (if required): **PRINT**	Signature	Date:	EXT:

FOR HR USE ONLY

Action/Reason Code:	Empl Class:	Actual Salary:	Base Salary:	Grade:	Step (R08 ONLY)
Prob Code:	Prob End Date:		Anni Date:		MPP Job Code
Comments:					
OHR Approval:	**Date**	**HRIS Process**	**Date**		

APPENDIX (4) PERSONNEL ACTION REQUEST FORM INSTRUCTIONS AND FORM (PAR)

California State University
Northridge

INSTRUCTIONAL PERSONNEL ACTION REQUEST FORM

INSTRUCTIONS

APPENDIX (4)

The Instructional Personnel Action Request Form (PAR) is to be used for **all Full-Time Faculty Personnel Transactions**. In addition, it is to be used for those **Temporary Personnel Transactions that cannot be processed through the PeopleSoft Part-Time Faculty or Student Hiring Modules**. The form must be signed by at least two approvers (normally, the Department Chair and the College Dean or MAR). With the exception of a PAR for a new FT/Tenure Track Faculty, PARs are to be forwarded to the Office of Human Resources for review and processing; completed PARS for new FT/Tenure Track Faculty should be forwarded along with the complete Hiring Packet to Faculty Affairs for review and approval. Following Human Resources' review and processing, a copy of the approved PAR will be sent to the College MAR for distribution to the appropriate department.

Line #	Item	Instructions
1	**College/Division**	Enter the name of the College or Division.
1	**Date**	Enter today's date. This should be the date the form was prepared.
2	**Empl ID #**	Enter the Faculty member's 9-digit PeopleSoft ID Number. If the faculty member is a new employee, or is not currently in the PeopleSoft system, enter "NEW" in this section.
2	**Record #**	Enter the Employee's corresponding PS Record Number.
2	**Empl Position #**	Enter the Employee's Position Number from Manager's Workbench that corresponds to the New/Changed Information. If a position number does not exist,
3	**Prefix**	Check the appropriate Prefix box. If Sign-In documents are different, HRIS will key from sign-in paperwork.
3	**First Name**	Enter the full, legal First Name as it appears on the Social Security Card (do not use nicknames or abbreviated names).
3	**MI**	Enter the Middle Initial, if any.
3	**Last Name**	Type in the full, legal Last Name as it appears on the Social Security Card.
4	**Reports to (name)**	Enter the name of the faculty member's direct supervisor .
4	**Reports to (position #)**	Enter the position number of the faculty member's direct supervisor.
5	**Action Requested**	Indicate the specific type of transaction that is being requested (e.g., appointment, reassignment, timebase change, promotion, resignation, retirement, retroactive correction, etc.). Provide as much detailed information as you can to assist Human Resources in determining what it is you are trying to accomplish. Please refer to PAR samples provided or contact the Office of Human Resources for assistance (ext. 6687). If a retirement or separation, note and discuss with Payroll any payout issues in advance.
6	**Employee Type**	Check the appropriate box or boxes to indicate the faculty member's status on the effective date of this transaction.
7	**Current Classification/Grade**	Indicate the faculty member's current job classification (Professor, Dept Chair, Lecturer, Teaching Associate, Graduate Assistant, etc.) and grade (A,B,C,D) when appropriate.
7	**Academic Year/12-month/Monthly**	Indicate which job status the faculty member currently holds.
7	**Current Department**	Indicate the faculty member's Department or Work Location prior to this
8	**New/Changed Classification**	Enter the faculty member's new payroll classification after this transaction, even if not different from current classification. For Example: An Associate Professor AY (current classification) promoted to Professor AY (new classification). See CSU Salary Schedule for Unit-3 Faculty Job Classifications.
8	**Academic Year/12-month/Monthly**	Indicate which job status the faculty member will hold after this transaction, even if not different from current status.
8	**New/Changed Department**	Enter the faculty member's new department/work location after this transaction, even if not different then current department.
9	**Current Dept ID**	Enter the faculty member's current 5-digit Department ID.
9	**Current Job Code**	Enter the faculty member's current 4-digit Job Code (Payroll Classification Code).
9	**Current Appt/Leave End Date**	Enter the current Appointment End Date or current Leave End Date, as appropriate. Leave blank for new employees. The appointment end date for Tenure-track faculty is INDEF (indefinite) unless they are on leave and have a

California State University Northridge

INSTRUCTIONAL PERSONNEL ACTION REQUEST FORM

INSTRUCTIONS

Line #	Item	Instructions
9	**Current Rank**	Enter the current faculty rank (0, 1, 2, 3, 4, or 5). Professor, Librarian, and Lecturer D = Rank 5; Associate Professor, Assoc Librarian, and Lecturer C = Rank 4, etc. Refer to CSU Salary Schedule for rank options within each Job Code.
9	**Current Paid Units**	Complete for Temporary/Part-Time Faculty and TA's only. Enter the number of units for which the faculty member is being paid before this transaction takes place. Paid Units can only be to the tenth decimal.
9	**Current Time Base**	Enter the current timebase in effect before this transaction takes place. **For part-time faculty** (fewer than 14.9 paid units) **enter the timebase as a fraction** (3/15, 12/15, etc.). **For full-time faculty** (14.9 or 15 paid units), **enter 1.0**. The timebase will be converted to a 2-digit decimal (.20, .80, .33, etc.) on the PAR, but the Actual Salary will be calculated automatically by multiplying the fraction times the full-time rate of pay. It is important to enter the fraction rather than the 2-digit decimal since the fraction may result in a decimal of more than 2-digits (e.g., 1/3 = .3333333333-333). The Actual Salary must
9	**Current Base Salary**	Enter the current full-time monthly rate of pay. This is the salary the faculty member would receive if full-time.
9	**Current Actual Salary**	The Actual Salary will populate automatically if the timebase has been keyed as a fraction (less than full-time) or 1.0 (full-time) and the full-time rate of pay has been entered in the Base Salary field. Difference-in-Pay Actual Salaries and Hourly Intermittent Salaries must be entered manually.
10	**New/Changed Dept ID**	Enter the 5-digit Department ID code that will be in effect upon implementation of this transaction, even if there is no change from current Dept ID.
10	**New/Changed Job Code**	Enter the 4-digit CSU Job Code that will be in effect upon implementation of this transaction. (e.g., 2358 for Lecturer AY, 2360 for Tenure-Track Faculty, etc.), even if there was no change from previous Job Code.
10	**Effective Date**	Enter the effective date of this transaction. For new or continuing faculty transactions (appointments, leaves, reassignments, timebase changes, etc.), this would be the beginning of the day on which the new or changed status is to take effect (Beginning of Business). For separating faculty (separations, resignations, and retirements), this would be the last day they will be in their current status (Close of Business).
10	**New/Changed Appt/Leave End Date**	This should be the last day of the Temporary Appointment or Leave (if on leave status). All Temporary Appointments and all Leaves must have an ending date. Enter INDEF (indefinite) for probationary or tenured faculty unless on leave.
10	**New/Changed Rank**	Enter the rank code (0, 1, 2, 3, 4, or 5) that will be in effect upon implementation of transaction, even if not different from current Rank.
10	**New/Changed Paid Units**	For Part-Time Faculty Only. Enter the number of units for which the faculty member is to be paid upon implementation of this transaction, even if no different from current Paid Units. Can only be to tenth decimal.
10	**New/Changed Time Base**	Enter the timebase as a fraction (3/15, 12/15, etc.) for part-time faculty; enter 1.0 for full-time faculty.
10	**New/Changed Base Salary**	Enter the Base Salary (full-time rate of pay) that will be in effect upon implementation of transaction.
10	**New/Changed Actual Salary**	The Actual Salary will populate automatically if the timebase has been keyed as a fraction (less than full-time) or 1.0 (full-time) and the full-time rate of pay has been entered on the PAR. For faculty on Difference-in-Pay Leaves, the Actual Salary will need to be manually entered (Regular AY Base Salary minus the full-time rate for Rank 2, minimum of salary range (currently $3,035).
11	**See Above**	Complete only if the individual has two concurrent positions
12	**See Above**	Complete only if the individual has two concurrent positions
13	**Transitional Leave Balances**	Complete only for Faculty transitioning between job classifications (eg.: from AY to 12-month).
	Approvals	Each PAR must be signed by at least two approvers. Normally, these would be the Department Chair and the College MAR or Dean.
14	**Remarks**	For Human Resources use only.

California State University
Northridge

INSTRUCTIONAL PERSONNEL ACTION REQUEST FORM

. College/Division: _____ Date: _____

. Empl ID #: _____ Record #: _____ Empl Position #: _____

. Name: ☐ Mr. ☐ Ms. ☐ Dr. _____ First Name _____ MI _____ Last Name

. Reports to (name): _____ Reports to (position #): _____

. Action Requested: _____

. ☐ Full-Time ☐ Part-Time ☐ GA ☐ TA ☐ ISA ☐ Article 12, 3-Year ☐ PRTB ☐ FERP ☐ Rehired Annuitant

	Job Classification/Grade	Academic Year/12-Month/Monthly	Department
. Current formation			
. New/Changed formation			

ob #1	Dept ID	Job Code	Transaction Effective Date	Appt/Leave End Date	Rank	Paid Units*	Time Base	Base Salary	Actual Salar
. Current formation							0.000		$0.00
0. New Information							0.000		$0.00

ob #2	Dept ID	Job Code	Effective Date	End Date	Rank	Paid Units*	Time Base	Base Salary	Actual Salar
1. Current formation							0.000		$0.00
2. New Information							0.000		$0.00

3. Transitional Leave Balances: Sick_____ Vacation_____ PH_____

APPROVALS:

	Name (Please Type or Print):	Signature:	Date:	Extension:	Mail Drop:
repared By:					
ept Chair:					
ean/MAR:					
A / HR:				Date To HR OPS:	

~ Submit Completed PAR Form to Human Resources by the 10th of the Month to meet Monthly Processing & Payroll Cut-Off Deadlines ~

* Complete "Paid Units" for Temporary/Part-Time Faculty and Teaching Associates Only

For Human Resources Use Only

. Remarks:

ction/Reason:		Effective Date:		PIMS TranCode:		Effective Date:	
ction/Reason:		Effective Date:		PIMS TranCode:		Effective Date:	
ppt End:		Last Day Worked:		Payroll Return:		Empl Class:	
M Pay Group:		Prob Code:		Prob End Date:		Anni Date:	
ppt Duration:		Ret Code:		Sabb Elig Date:		DIP Elig Date:	
MI Amt:		FERP End Date:		Remaining SSI's:		Final Anni Date:	
RTB End Date:		Visa Type:		Visa Exp Date:		2481 AdminFrac:	
PS Input Init:		OPS Input Date:		OPS Audit Init:		OPS Audit Date:	

HR: PM SOP Appendix 4 PAR Blank 5/10/2012