



What is a Position Action Request Form?

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

*** To modify Job Code, Working Title, and/or Reports to Position data you must submit an updated Position Description form to Human Resources.

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: Departments shall email completed PARs to their respective Divisional Coordinator for initial review and approval. The Divisional Coordinator shall then email the approved PAR to Budget and Finance at budget@mail.sdsu.edu. Budget and Finance will not process hard copy forms.

Form: The most current version of the PAR form can be found at the Budget and Finance Website (https://sdsuedu.sharepoint.com/sites/BFA/budfin/Forms/) and looks like this:

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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.																																																																																																																									
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Completing the Form

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

Position Action	Reason Code	Description & Process Details	Data Elements Required on the PAR
Add A Position	NEW	<p>This is the 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.</p> <p><i>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.</i></p>	<p>Provide Dept ID #, Job Code, Pool ID (leave blank for position level funding), Working Title, Reports to Position #, FTE, Head Count, Grade/Range and Unit.</p> <p>For new MPP positions, MPP codes must be provided. Please contact HR for assistance in determining correct codes.</p> <p>Note: Working Title should match title on Position Description.</p>
Inactivate a Position	INA	<p>This action changes a position status from active to inactive. Positions are inactivated if they are no longer authorized for active appointments. Positions are never deleted in PeopleSoft.</p>	<p>Provide Position # only.</p> <p>Position must be vacant.</p>
Reactivate a Position	REA	<p>This action changes a position status from inactive to active. Positions are reactivated if they are reauthorized for active appointments.</p> <p>This action may also be used to change the classification of the position being reactivated when the department requires that the position be reclassified prior to submitting a recruitment requisition or hiring/transfer/promotion action ATF/STF.</p>	<p>Provide Position # only.</p> <p>Position must be inactive.</p> <p>Provide new Job Code, Working Title, and/or Grade/Range as applicable.</p> <p>Note: Working Title should match title on Position Description.</p>
Reorganization	REO	<p>This action is used to reflect a department and/or unit (paycheck distribution) change to a position. It will also require a change in Pool ID and Reports to Position # if for a department change.</p>	<p>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 #.</p>
Update Data	UPD	<p>This action is used to change one or more of the following data elements: Pool ID, Reports to Position #, FTE, Grade/Range and/or Head Count.</p> <p>Note: The PAR only changes the position data – FTE changes to the employee must be requested via the ATF/STF process.</p>	<p>Provide Position # and any of the data elements that have changed. These may include: Pool ID, Reports to Position #, FTE, Grade/Range and/or Head Count.</p>



Funding Action	Reason Code	Description & Process Details	Data Elements Required on the PAR
New Pool ID	UPD	This action is used to request a new Pool ID. Pool IDs are specific to a Dept ID # and are used to link a position to a funding source during the LCD process. Pool ID values are assigned by Budget & Finance.	Provide Position # and funding account (Dept ID/ORG, Project/Activity, Class/Endeavor, Fund, and Program/Function).
Position Level	UPD	This action is used to request that funding accounts be assigned at the position level in the Department Budget Table. This is used when an employee is funded by multiple accounts; the employee cannot be appointed to a multiple head count position.	Provide Position #, funding account (Department ID/ORG, Project/Activity, Class/Endeavor, Fund, and Program/Function) and percentage allocation to each account (up to three decimals).

Position Action Form FIELD DESCRIPTIONS:

- **Requestor Name:** Name of the requestor who should be called if questions arise.
- **Department ID:** Department ID where the position is currently located (5-digit Oracle Organization number).
- **Requestor Ext:** Phone number of the requestor who should be called if questions arise.
- **Effective Date:** 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:** Name of the employee currently in the position if occupied. (Last, First, MI)
- **Comments:** Additional information that will assist in processing the request.

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 #** - Enter the 8-digit position number as assigned in the CMS HR system.
- **Dept ID #** - Enter the 5-digit Oracle Organization number where the position should be located; must be a valid number in the HR table.
- **Job Code** - Enter the 4-digit classification code as approved by HR.
- **Position Pool ID** - Enter the 3-digit alphanumeric Pool ID linking the position to the appropriate funding source. A pool ID must already be established for the Dept 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. Instructions for running the Departmental Pool ID Query to identify available Pool IDs for your department can be found here: <https://sdsuedu.sharepoint.com/sites/BFA/budfin/Forms/>
- **Working Title** - Enter the working title for the position. Working titles should match the title contained in the Position Description. The field length for the Working Title/Description is limited to 30 characters (spaces included).
- **Reports to Position #** - Enter the 8-digit position number of the supervisor. Only one "reports to" supervisor may be indicated. This is typically a Dean, Department Chair, Coach, or MPP position; contact HR for assistance if needed.
- **FTE (Time Base)** - Enter the time base for the position – this is required for all positions. Note: All student job classifications should reflect a FTE of 0.01.
- **Head Count** - Enter the maximum number of incumbents authorized for hire/appointment into the position; this number should reflect a realistic expectation of how many employees may be hired.



- **Grade/Range** - Enter the appropriate grade/range for the position. This is required for any positions within a job code/classification that has multiple ranges tied to a different pay scale. Student positions should reflect a blank grade/range; multiple headcount positions should reflect a grade/range of zero.
- **Unit** - Enter the 3-digit code of the unit; this designates where the 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 facilitates 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.
- All positions created in the PeopleSoft HR system are assigned an 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. Prior to requesting a new position, please review existing positions to see if the position already exists and/or if there is an existing vacant position that can be modified to accommodate the position request. An existing vacant position may be modified if it is located in the requested department and has the same, or similar, job classification – this allows history to be retained on the position. Please review remaining data (e.g. Reports to Position #, Pool ID, etc.) to determine if modification of the position will accommodate the 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. Instructions for running the Position Incumbent Report can be found here:
<https://sdsuedu.sharepoint.com/sites/BFA/budfin/Forms/>

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, Pool ID, Working Title, Grade/Range, Report to Position # (supervisor), 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*) are created for:

- **All Tenure and Tenure Track Faculty Positions**
- **Temporary Lecturer** positions in the same Department and using the same Pool ID (funding source).
- **Student Assistant** and **Work-study** positions in the same Department, and using the same Reports to Position # (supervisor) and Pool ID (funding source).
- **Some Staff positions** when all data elements are identical: Department, Job Code, Pool ID, Job Description and Working Title, Grade/Range, Reports to Position # (supervisor), and Unit.
- 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).