



Equal Opportunity & Workforce Planning | One Washington Square | San José, CA 95192-0046 408-924-2250 | 408-924-1784 (fax)

- Instructions:**
- To be used for all position management actions. Requests include establishing a new position (Staff, Faculty, Student Assistants, Graduate Assistants, Teaching Associates, or Temporary Positions that last for five months or less), updating an existing position. For multi-incumbent positions, only one position number is required per Department ID, unless different funding sources are used. To initiate the action, provide the appropriate information that corresponds to the change. For definitions of fields, refer to the attached Quick Reference for Position Management Action Form.
 - Before** completing this form, print and review a current **Active Position List** from PeopleSoft for your department.
(Home > CSU Custom Rpts/Interfaces > San Jose > Rpts A-M > Active Position List)
 - Type or print legibly in ink. Submit this form to Equal Opportunity & Workforce Planning, UPD Building, 0046.

CONTACT INFORMATION				
Requestor:	Telephone:	Department Name:	Dept. ID:	Zip:
HR Contact:		HR Contact Telephone:		

ACTION REQUESTED	
<input type="checkbox"/> ESTABLISH NEW POSITION	<input type="checkbox"/> UPDATE EXISTING POSITION Position #: _____
Reason: _____	
Working Title: _____	
Effective Date: _____	Department Name: _____
Dept. ID: _____	Job Code: _____
Classification Title: _____	Grade/Range: _____
Pool ID: _____	CSU Unit: _____
Fund Description: _____	Account # (Dept. ID-Fund-Account-Class)/%: _____
<input type="checkbox"/> Regular <input type="checkbox"/> Temporary <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Single Incumbent <input type="checkbox"/> Multi incumbent	
Reports to Name: _____	
_____ Reports to Position Number (not Emp. ID)	

Authorized Approver Signature: _____ Date: _____

FOR HUMAN RESOURCES/FACUTY AFFAIRS USE ONLY:			
Position #:	FA Signoff:	Completion Date:	_____
	HR Signoff:	Completion Date:	_____
MPP Job Family Code:	MPP Job Function:	MPP Reporting Category:	_____

REQUIRED INFORMATION

The following information is required in order to establish or update a position:

Reason for the Request	Pool ID
Working Title	CSU Unit (normally the least 3 digits of the extended zip)
Effective Date	Fund Description
Position # (if position already exists)	Account # (Dept. ID-Fund-Account-Class)
Department Name	Regular or Temporary
Dept. ID	Full-Time or Part-Time
Job Code	Single Incumbent or Multi-Incumbent
Classification Title/Grade	
Reports to Name (normally immediate supervisor)	

HELPFUL DEFINITIONS

Working Title:	Assigned to a particular position to reflect the position's job functions.										
Effective Date:	For new positions use the first of any month prior to the employee's appointment. For funding issues see Pool ID.										
Classification Title/Grade:	A title that generally corresponds to the CSU Classification Standards- (http://www.calstate.edu/HRAdm/Classification/index.shtml)										
Pool ID:	The Pool ID maps to a funding source in the Department Budget Table. If submitting between the 1 st and the 25 th of the month, for the staff positions use the 1 st of the current month's request or future; and for student positions, use the 1 st of the previous month or future. Common Used Pool ID values: <ol style="list-style-type: none"> 1. 100 = General Fund Support Approp. 10002 2. 105 = General Fund Support Approp-RA Exp 10102 3. 533 = Trust-CERF Ext Ed Exp- 48000 4. 551 = Instructional Related Activity <p>Note: Not all departments have these funding sources available. Accounting can create additional pool ID to funding source map, once created, the Workforce Planning Unit can complete the position funding transaction.</p>										
CSU Unit:	CSU Unit reflects a check sort unit for pay check distribution. CSU Unit is usually the last three digits of the extended zip and must be initiated before the 20th of the month for staff and the 14th for students so the new CSU Unit can be reflected in the student attendance time sheets.										
Fund Description:	The value entered in this field identifies the permanent funding source. Also used for the long-term commitment of a performance increase. Valid Fund Description values: <table border="0" style="width: 100%;"> <tr> <td>1. CERF = Continuing Education</td> <td>6. OTH = Other</td> </tr> <tr> <td>2. GFND = General Fund</td> <td>7. Parking</td> </tr> <tr> <td>3. HSE = Housing</td> <td>8. RA Reimbursed Activities</td> </tr> <tr> <td>4. LTRY = Lottery</td> <td>9. STH = Student Health</td> </tr> <tr> <td>5. NA Not Applicable</td> <td>10. TRST = Trust, Other</td> </tr> </table>	1. CERF = Continuing Education	6. OTH = Other	2. GFND = General Fund	7. Parking	3. HSE = Housing	8. RA Reimbursed Activities	4. LTRY = Lottery	9. STH = Student Health	5. NA Not Applicable	10. TRST = Trust, Other
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Split Funding:	Split funding is primarily handled through Accounting and is enabled by creating an Appointment Level Budget attached to an Employee ID and Record #. A position that is split funded on a permanent basis can have a Pool ID setup to split the funding by default.										
Reports to:	Name and position number required unless the position is for a student or Special Consultant.										