



**CSU Long Beach**


**How to complete**

**Position Pool ID Form**

Administrative Service Managers (ASM) are responsible for defining the chartfield/funding attributes of positions within their departments/organizational units for the purpose of labor cost distribution. They do this by creating position pools for each department. The pool ID links employees via PeopleSoft position numbers to the financial chartfields to which labor costs will be charged. The Department Position Pool ID form is used to add a new position Pool ID or modify an existing position Pool ID.

The form can be found at the Budget Planning & Admin

[http://www.csulb.edu/divisions/af/cms/end\\_user/HR/forms/index.html](http://www.csulb.edu/divisions/af/cms/end_user/HR/forms/index.html)

|  <b>California State University, Long Beach</b><br><b>Department Position Pool ID Form</b>                              |  |         |                   |  |         |          |
|--|--|---------|-------------------|--|---------|----------|
| ASM Name   |  |         |                   | ASM Phone & Email                                  |         |          |
| Department Name  |  |         |                   | POSH DEPT ID                                       | POOL ID |          |
| Effective Date   | <small>Indicate the first budget month you want this POOL ID to be used. Changes can only be made retroactive to July 1 of the current fiscal year. Note: To make retroactive changes, an HR Expenditure Adjustment needs to be processed.</small> |         |                   | <small>(3 characters, alpha &amp; numeric)</small> |         |          |
| <b>Actions</b> <input type="checkbox"/> Add New Position Pool ID <input type="checkbox"/> Modify Existing Position Pool  |  |         |                   |  |         |          |
| New/Revised Pool ID Description <small>(30 Character Limit)</small>  |  |         |                   |  |         |          |
| New/Revised Pool ID Short Description <small>(10 Character Limit)</small>  |  |         |                   |  |         |          |
| <b>Please list the desired chartfield attributes of the Position Pool ID</b>   |  |         |                   |  |         |          |
| <small>NOTE: If making a change, the chartfields shown below will affect ALL positions associated with the Pool ID. To change a Pool ID attached to a position, complete a Position Action Form.</small> |  |         |                   |  |         |          |
| <b>Account Code Map (Chartfield Values)</b>  |  |         |                   |  |         |          |
| FUND   | DEPTID   | PROGRAM | PROJECT/GRANT     | CLASS  | %       | Comments |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  |         |          |
|  |  |         |                   |  | 0%      |          |
| <small>Please email ASM approved forms to <a href="mailto:budget@csulb.edu">budget@csulb.edu</a></small>   |  |         |                   |  |         |          |
| <small>ASM Approval</small>  |  |         |                   |  |         |          |
|  |  |         |                   |  | Date    |          |
| <small>(Note: emailed forms are verified as approved by ASM by the originating email address)</small>  |  |         |                   |  |         |          |
| <small>Department/Division Approval (Optional)</small>   |  |         |                   |  |         |          |
|  |  |         |                   |  | Date    |          |
| <small>Budget Officer</small>  |  |         |                   |  |         |          |
|  |  |         |                   |  | Date    |          |
| <b>Budget Use Only</b>   |  |         |                   |  |         |          |
| Setup:   |  |         | Position Pool ID  |  |         |          |
|  |  |         | Account Code      |  |         |          |
|  |  |         | Dept Budget Table |  |         |          |

Departments must complete a Position Pool ID form:

1. To add a new Position Pool ID for a department to link financial chartfields to positions for labor cost distribution.
2. To modify an existing Position Pool ID description or/and chartfield/funding attributes or funding distribution of multiple chartfields.

## Position Pool ID

The **Position Pool ID** is:

- ⇒ the **key to labor cost distribution**
- ⇒ **department specific** (so you can reuse the same value for every department)
- ⇒ a value up to **3 characters** (alpha & numeric) which is **ASM defined**
- ⇒ **attached to every employee** by the position
- ⇒ **capable of defining multiple funding sources** at set percentages so the employee is hired into a single position (and the employee will receive only one paycheck!)
- ⇒ **a label only**; behind the scenes set up by Budget links the Position Pool ID to funding chartfields. Therefore, effective dated changes can be made without changing the Pool ID value.
- ⇒ the **default fund source** for labor cost distribution.

### Important Notes

To inactivate Position Pool IDs, there should be no active position(s) attached to it. If the Pool ID you want to inactivate is attached to any active position(s), you must change a Pool ID for that position(s) before you can inactivate it. To change a Pool ID attached to a position, complete a Position Action Form (PAF) and submit to [budget@csulb.edu](mailto:budget@csulb.edu).

When you modify the chartfield/funding attributes for an existing Position Pool ID, be aware that this change will affect all positions attached with this Pool ID. To change a Pool ID attached to a position, complete a Position Action Form (PAF) and submit to [budget@csulb.edu](mailto:budget@csulb.edu).

- **ASM Name:** ASM with responsibility for labor cost distribution for the impacted department.
- **ASM Phone and Email:** The campus phone number and email address of the ASM. (If you send the form via email, that address is unnecessary.)
- **Department Name:** The name of the department for which the Position Pool ID is being established or changed.
- **Position DeptID:** Indicate a valid position department ID (the field is formatted for 5 digits – you do not have to type the leading zeroes). This position DeptID ties to Pool ID and chartfield/funding attributes.
- **Pool ID:** Indicate the 3-character (numeric or alpha) position pool ID to be created or modified. This Pool ID ties to position DeptID, position, and chartfield/funding attributes.
- **Effective date:** The date chosen will dictate when the labor cost distribution changes will take effect. Please list the first payroll **month** you want this Pool ID to be used. The **effective date is always the 1<sup>st</sup>** day of the payroll month. Retroactive changes can only be made to July 1 of the current fiscal year using HR Expenditure Adjustment.
- **Action(s) Requested:** There are only two actions authorized by this form. Check the appropriate box:
  1. Add a New Position Pool ID for the department, or
  2. Modify an existing Position Pool ID for the department.
- **New/Revised Pool ID Long Description:** The ASM can describe the pool ID according to their own naming conventions and requirements. The long description can be up to 30 characters. The description can be modified.
- **New/Revised Pool ID Short Description:** The ASM can describe the pool ID according to their own naming conventions and requirements. The short description can be up to 10 characters. The description can be modified.
- List all of the chartfield/funding attributes for the Position Pool ID in percentage amounts; any valid combination up to 100% is possible. Use actual valid chartfield values and combinations (as prescribed by Financial Management).

For example:

| FUND  | DEPTID | PROGRAM | PROJECT/GRANT | CLASS | %   |
|-------|--------|---------|---------------|-------|-----|
| GFE02 | 00231  | 10110   |               |       | 50% |
| RAE02 | 00722  |         |               |       | 24% |
| 44101 | 00726  | 10171   |               |       | 26% |

The Budget Office will validate that the chartfield combinations will pass legal “combination edits” prescribed by Financial Management.

- **Comment Section:** to be used as appropriate to convey information to the Budget Office.
- **ASM Approval:** Sign for hardcopy or type the ASM's name if you send the form via email (the form will be assumed to be approved if received from the ASM's email address or that of his/her formally authorized designee.)
- **Department/Division Approval:** optional if required for internal processing, please notify the Budget office, otherwise it will be assumed that the ASM's approval is sufficient.
- **Budget Office:** after processing, the Budget Analyst will send an email confirmation to the ASM and retain a hardcopy of the form as an audit trail.

## Miscellaneous Guidelines

- A Position Pool ID is only three characters, any combination of alpha and numeric. ASMs may name their Position Pool IDs according to their own established conventions and rules. A long description of 30 characters and a short description of 10 are essential for each Position Pool ID.
- A Position Pool ID is unique to a department therefore you can use the same Position Pool ID for every department. The key is what chartfields are mapped to the Position Pool ID and in what combination for each department – be careful as they may be different despite the identical name! For consistency, we suggest a Pool ID be used for similar funds/programs within your department.
- You can specify different chartfield combinations by percentages with as many combinations as necessary.
- A chartfield combination can reference a different department ID other than the department for which the Position Pool ID is being created.

If there are any questions, please email [budget@csulb.edu](mailto:budget@csulb.edu) or contact a Budget Analyst at Ext 5-2480.

The effective date of a change to a Position Pool ID is critical. Retroactive changes can be made retroactive to July 1 of the current fiscal year. To make retroactive changes, an HR Expenditure Adjustment needs to be processed.