



General Operating Fund Position Management 101

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Agenda

- Position Management Basics
- Position Budgeting
- Questica and Position Management
- Position Changes
- New Forms
- Q&A

Disclaimer!

- Information presented is on best practices and BPA campus processes
- Division & division leadership may have requirements for you on how to accomplish specific tasks
- Refer to division leadership processes first, then BPA processes

Position Management Basics

What is a Position?

- A position represents a job



- We track positions to:
 - Estimate benefits pool
 - Manage financial obligations of the university

Position Numbers



- Each unique staff & management position have their own position number.
- Temporary positions (like students, lecturers and casual workers) can be pooled.

Key Components of a Position Number

- Job Code
- Grade
- Working Title
- Reports To (must be MPP and/or Faculty Director)
- Temp/Regular
- FTE
- Dept ID
- Fund
- Class Code (if applicable)

Individual Positions vs. Pooled Positions

- **Academic Salaries**
 - Department Chairs
 - Tenure-Track Faculty
 - Other Academics (Librarians)
- **Staff (permanent/temporary)**
- **Management and Supervisory**
- **Part Time Faculty/Lecturers**
- **Casual workers, contract employee, retired annuitants, special consultants, additional appointments**
- **Student Assistants**
 - Graduate Assistant
 - Teaching Associates
 - Student Assistant
 - Work-Study Students

Why Do Position Numbers Matter?

Fiscal Responsibility

- Employees are our biggest asset & largest expense
- Salaries and benefits

	Position	5% Raise	Difference
Salary	\$50,000	\$52,500	\$2,500
Benefits	\$31,000	\$31,991	\$991
Total Cost	\$81,000	\$84,491	\$3,491

- These changes commit the university to an ongoing obligation
- Concerning budget outlook

Position Management Policy

- <https://sacramentostat.policystat.com/policy/16020594/latest/>

POSITION MANAGEMENT POLICY

Position Management is the process of establishing, adding, changing, and maintaining organizational designations within the university structure. It is the practice that organizes staffing at the university. Whether there is a vacancy for an existing position, or there is a need to create a new position, Position Management facilitates the hiring of new personnel, and the managing of the staff thereafter. Position Management also allows for reporting that helps the user manage new and existing positions in the university.

Policy Statement:

It is the policy of the university that managing positions and filling vacancies be handled in a manner that takes into consideration conserving resources while sustaining the mission of the university and improving the delivery of education to our students. Position management is the responsibility of all members of the university who are responsible for hiring employees and managing budgets. The ultimate authority to create new positions and to refill existing vacancies resides with the campus President. New positions and corresponding funds, if applicable, are to be requested through the President's Budget Advisory Committee (PBAC) budget process. Filling existing vacant positions does not need to go through PBAC. Exceptions to this annual process may be requested to the President and CFO with funds identified to cover the both the salary and benefit costs of the position. All requests for new full-time positions shall include a detailed workload analysis to demonstrate consistent, full-time work will be performed.

It is the policy of the university to periodically review and/or eliminate positions that have been vacant for longer than eight months. Timing and direction for the reviews shall be dictated by the President, and be carried out collaboratively by the Central Budget Office and the Human Resources Office.

This policy currently excludes faculty that provide instruction. However before the new fiscal year, Academic Affairs shall provide to the CFO and President for approval a list of the number of new faculty and lecturer positions that are being added, along with the fiscal implications.

Benefits

- **Positions in MDS01 have benefits covered centrally by the benefits pool**
 - New permanent positions created by divisions in MDS01 will have benefit costs reduced in their baseline to pay for increase benefits costs
- **Positions in all other funds are responsible for benefits costs within the same fund**

Benefits Rate Chart

Account	Benefit / Description		Unit 1	Unit 3			Unit 4	Unit 6	Unit 8	Unit 11	CSUEU	C99	MPP	
			Union of American Physicians & Dentists (UAPD)	California Faculty Association (CFA)			Academic Professionals of California (APC)	Skilled Crafts (Teamsters 2010)	State University Police Association (SUPA)	Academic Student Employees (UAW)	California State University Employees Union (CSUEU)	Confidential	Management Personnel (M80)	
				Tenure Track	Lecturers Timebase > 40%	Lecturers Timebase < 40%	Academic Support Unit				Units 2, 5, 7, 9			Directors & Lieutenants of Public Safety
603001	OASDI (Old Age Survivor & Disability Insurance)	[3, 7]	6.20%	6.20%	6.20%	0.00%	6.20%	6.20%	6.20%	0.00%	6.20%	6.20%	6.20%	6.20%
603003	DENTAL INSURANCE	[2, 4]	1.10%	1.10%	1.10%	0.00%	1.10%	1.10%	1.10%	0.00%	1.10%	1.10%	1.10%	1.10%
603004	HEALTH & WELFARE	[2, 4]	21.64%	21.64%	21.64%	0.00%	21.64%	21.64%	21.64%	0.00%	21.64%	21.64%	21.64%	21.64%
603005	RETIREMENT	[5, 7]	31.70%	31.70%	31.70%	0.00%	31.70%	31.70%	50.65%	0.00%	31.70%	31.70%	31.70%	50.65%
603007	WORKER'S COMPENSATION		0.58%	0.58%	0.58%	0.00%	0.58%	0.58%	0.58%	0.00%	0.58%	0.58%	0.58%	0.58%
6030XX	IDL/ND/UI	[8]	0.53%	0.53%	0.53%	0.00%	0.53%	0.53%	0.53%	0.00%	0.53%	0.53%	0.53%	0.53%
603011	LIFE INSURANCE	[2]	0.05%	0.04%	0.04%	0.00%	0.05%	0.05%	0.05%	0.00%	0.05%	0.05%	0.05%	0.05%
603012	MEDICARE	[3, 7]	1.45%	1.45%	1.45%	0.00%	1.45%	1.45%	1.45%	0.00%	1.45%	1.45%	1.45%	1.45%
603013	VISION CARE	[2]	0.09%	0.09%	0.09%	0.00%	0.09%	0.09%	0.09%	0.00%	0.09%	0.09%	0.09%	0.09%
603014	LONG TERM DISABILITY INSURANCE	[2]	0.01%	0.05%	0.05%	0.00%	0.01%	0.01%	0.01%	0.00%	0.01%	0.01%	0.04%	0.04%
TOTAL			63.35%	63.38%	63.38%	0.00%	63.35%	63.35%	82.30%	0.00%	63.35%	63.35%	63.38%	82.33%

- All new positions are subject to the total benefits costs for the respective union/employee group
- Positions (including temporary positions) that have new budget impacts are responsible for the increased benefits costs (OASDI, Retirement, and Medicare)

Position Budgeting

Division Responsibilities for Position Budgeting

- Ensure baseline funding exists at the departmental level for all permanent employees funded by the Operating Fund
 - If baseline funds are not sufficient to cover salaries, positions must be assigned either fully or partially to other permanent funding sources (split funding), eliminated, or re-classified as temporary positions
- Ensure all vacancies that are slated to be filled are identified and budgeted in baseline to ensure that ongoing funding is available
 - This allows for proper tracking for the campus to receive better aligned future funding and compensation adjustments from the Chancellor's Office
- Ensure all positions that are eliminated or have funding reduced are deactivated in CHRS

Position Budgeting

- Identifying annual, baseline dollars for all permanent positions to account for annual salary & benefits costs
- Permanent employees are tracked in individual positions. These positions require annual baseline dollars
- Vacant permanent positions for individuals that are slated to be filled are also tracked individually and require annual baseline dollars
- Position “pools” represent position categories that are for various temporary staff. These positions are budgeted in a group by line item and require one-time funding. If funding is not available for pooled positions, these positions are not hired

Permanently Budgeted Positions vs. Temp Help

Permanently Budgeted Positions

1038 - Admin
Analyst/Spclst

Analyst

1035 - Admin
Support Coord

Coordinator

3318 –
Administrator I

Director

- Funding is constant year over year
 - Employee in role may change

Temporary

1038 – Temp.
Admin Analyst/
Spclst

- Funding changes year over year, based on need
 - Employees change

Fiscal Changes to Permanently Budgeted Positions (General Fund-MDS01)

- General Salary Increases (GSI)'s, Merit Salary Increases for Management/Confidential employees, Step Increases and Unit 4 stipends and bonuses (BSM, EAS, LTSB), are funded by the Campus Compensation Pool managed by BPA
- Equity Adjustments, Stipends, Bonuses, and Position Reclassifications are funded by Division Budgets
- Benefits are owed to the benefits pool for all fiscal changes, either from the compensation pool or division budgets

Temporary Funding Scenarios

- Temporary positions may receive different types of additional funds:
 - Bonuses
 - Stipends
 - Other compensation
- Divisions are responsible for budgeting for these increased costs on a one-time basis
- Funding for these types of items may come from salary savings, operating expenses, additional revenue, etc.
- Divisions must ensure these costs are incorporated into projected expenses (including their Quarterly Projection Report due to BPA)

Questica and Position Management

What is Questica?

- Questica is a web-based budgeting and planning tool that helps divisions build budgets, manage positions, forecast expenses, and generate reports all in one place



Plan → Budget → Review → Approve → Report

Questica Implementation

- Effective July 1st, all budget transactions will be processed in Questica
- All permanently-budgeted positions have been migrated to Questica for all Funds from CHRS
- BPA met with divisions to reconcile positions in Questica and prepare for the FY 26-27 Budget Call

Budget Call FY 2026-27 for MDS01

- Position rosters have been finalized and were used as foundation for preparing budget call plan for divisions
- Permanent base position allocations will be assigned to departments based on the approved Budget Call worksheets
- Divisions will populate and return signed templates
- BPA has designed a change request system to manage ongoing position maintenance

FY 2026-27 Position Implementation

- Position changes for permanently budgeted employees will now be updated in the budget on a regular basis
- BPA will maintain position rosters in Questica in collaboration with divisions
- Ongoing benefits adjustments will be actively made for positions that increase costs in the benefits pool for permanently-budgeted positions

PageUp

- Anticipated Hiring Range and Chartfield are required:

Anticipated Hiring Range:		\$4,593 - \$6,823
Budget/Chart field/Account string:		MDS01-47900

- If the proposed hiring range exceeds the approved range, funding availability will need to be confirmed before approval can be processed
- Missing information may delay approval

Position Changes

Position Management Crosswalk

REPORTS-TO	Submit a "Reports To" Change request. <i>*Reports-to changes should not be processed through ePTF or IRT ticket.</i>
WORKING TITLE	Submit email to Class & Comp (staff/MPP) or Faculty Affairs (faculty).
FUNDING SOURCE/DEPT ID/JOB CODE/GRADE	If the staff/faculty position is filled , submit an ePTF. If the staff/faculty position is vacant , submit a New/Update Position Number Request . <i>*Job code changes require an approved position description.</i>
INACTIVATION	Submit email to BPA with list of position numbers to deactivate.
NEW PERMANENT POSITION (OUTSIDE OF BUDGET CALL PROCESS)	Submit email to BPA, including: 1. New Position Questionnaire 2. Position Description 3. Dept Org Chart 4. Workload Analysis 5. Memo/Justification Signed by Division VP 6. Hiring Freeze Exception <i>*A workflow of this process can be found on the BPA webpage.</i>
NEW TEMPORARY POSITIONS (STAFF/FACULTY)	Submit a New/Update Position Number Request with approved position description. Hiring Freeze Exception will be verified. <i>*Pooled position numbers (students, faculty addlt appt., etc.) can be requested via the Request for New Pooled Position.</i>

***Hiring Freeze Exception is in process of being updated to new "Position Recruitment & Funding Request"**

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No fiscal impacts



No fiscal impacts



Fund/dept or salary changes



If inactivating a permanent position,
potential annual benefits savings



Ongoing salary & benefits cost impacts



Temporary salary & benefits cost
impacts

Position Examples

Example 1: IRT wants to hire a new permanent Desktop Support Technician

- Estimated Salary: \$84,000
- Estimated Benefits @ 63.35%: \$53,214
- Annual Total for New Position: \$137,214
- Position must be approved by President
- BPA will create the new position in CHRS/Questica and issue position number
- Creates ongoing fiscal need of \$137,214 to be addressed in baseline (can be operating expenses or another position, but funding must be identified prior to position creation)

Example 2: Student Affairs wants to hire a 90-Day Emergency Hire in Housing Facilities

- Estimated Salary: \$12,000
- Estimated Benefits @ 63.35%: \$7,602
- Annual Total for New Position: \$19,602
- BPA will create the new position in CHRS/Questica and issue position number
- Creates one-time fiscal need of \$19,602 (can be operating expenses, salary savings, etc. for divisions with surplus funds)

Active Position Report (SACHR025)

- Before submitting new position requests, departments may check active positions in Cognos:

[Team content](#) / [Human Resources](#) / [CHRS Department Users](#)



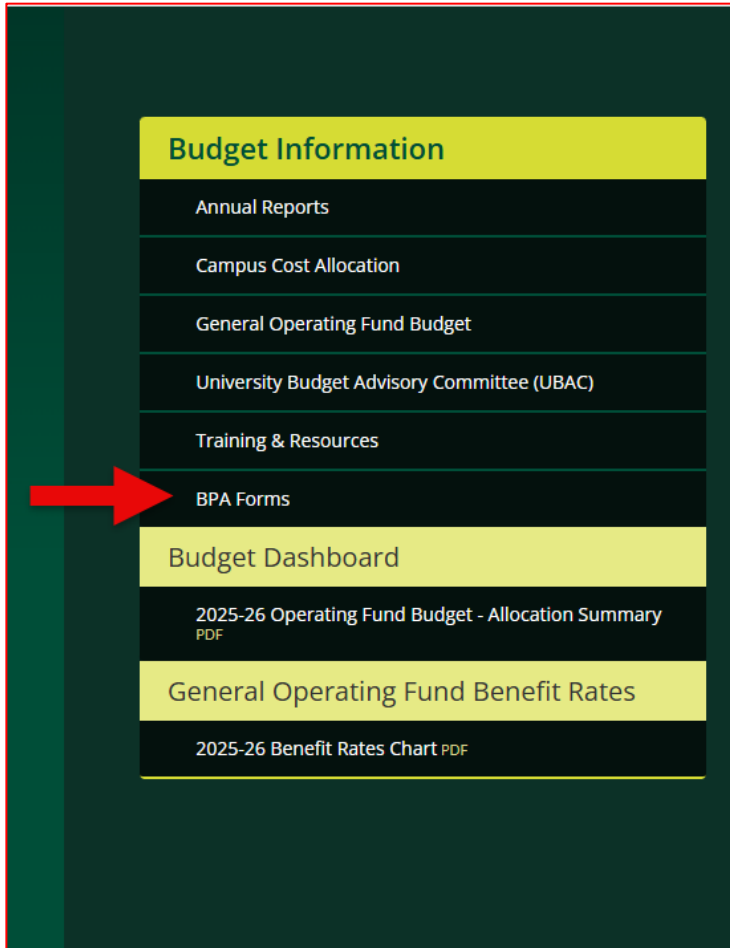
- Report includes the following information:
 - Funding Information (Fund, Dept, Class, Account etc...)
 - CHRS Position Number, Position Description
 - Job Code and Grade
 - Reg/Temp position
 - FTE
 - Vacant or Active Employee Information (Name, EmplID, Rcd)
 - Reports to Information (position number and name)
 - *Note: all reports-to should be MPP or Faculty Director, only

Permanent Position Request Process

1. Email New Position Packet to BPA
2. Request routed to CFO and President
3. New Position created in CHRS/Questica
4. Baseline Adjustments are made in next fiscal year, including benefits costs due to benefits pool

New Forms!

Budget Forms



Budget Planning & Administration

Budget Planning & Administration partners with numerous campus entities, including the President, to develop and the Campus Operating Budget. They also ensure compliance and transparency by producing the university's annual report. They can be reached [here](#) [EMAIL](#).

Form	Revision Date
Request for New Pooled Position Number	February 2026
"Reports To" Change	February 2026
Request for New Position Numbers (MPP or Staff)	February 2026
Project Code & Funding Request Form	February 2026
Budget Transfer Instructions	July 2026
Budget Transfer	July 2026
One-Time Salary Budget Transfer	July 2026
Class Chartfield Request	June 2021
HR Adjustment Request (LCD/Payroll Adj.)	March 2026
Staff Release Time	March 2023
Position Vacancy Extension Request	March 2023
New Position Questionnaire	June 2023
Position Base Budget Adjustment Form	July 2026

Position Base Budget Adjustment Form



SACRAMENTO STATE

Budget Planning & Administration (BPA)

Position Base Budget Adjustment Form

Purpose

Per the Sacramento State Position Management policy, divisions are expected to identify funding sources before new PERSONNEL commitments are approved. The purpose of this form is to identify a funding source prior to Budget Office approval for position adjustments. Beginning July 1, 2026, all position adjustments will be processed as budget transfers within Questica. Divisions must have funding available. Please note only the Line Description will reflect in FDW; Transfer description is to provide more detail of the reason behind the transaction. Submitter must provide Delegation of Authority (DOA) and cannot be both the submitter and approver. This Position Budget Adjustment Form is available on the ABA Forms webpage.

Transfer Description

Net Amount:

0.00

Must Net to Zero

One Time Salary Budget Transfer Form

Transfer Description:

[illegible]

Position Examples

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Use Position Base Budget Adjustment Form

- If funding position from an existing salary line that will be deactivated, benefits do not need to be included in the form.
- If funding from an operating expense budget line, benefits will need to be included into the calculation for the new position.

Position Examples

Example 2: Student Affairs wants to hire a 90-Day Emergency Hire in Housing Facilities

- Estimated Salary: \$12,000
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- BPA will create the new position in CHRS/Questica and issue position number
- Creates one-time fiscal need of \$19,602 (can be operating expenses, salary savings, etc. for divisions with surplus funds)

Use One-Time Salary Budget Transfer

- Similar to a regular budget transfer, this request moves budget either between salary lines or from operating budget to salary.
- If funding position from an existing salary line that will be deactivated, benefits do not need to be included in the form.
- If funding from an operating expense budget line, benefits will need to be included into the calculation.

Coming Soon: Position Recruitment & Funding Request Form

- Replaces the following forms:
 - Hiring Freeze Exception
 - New/Update Position Number Request (MPP or Staff)
- One form for recruitment approval & new position request
- New workflow includes Division Budget Approver & BPA before President's Office approval.
 - Creates transparency and accountability in the divisions to provide funding source for new positions or position changes before committing resources.

Position Resources & Forms

- BPA Forms
 - Pooled Position Update Form
 - New MPP or Staff Position Update Form
 - HR Adjustments
 - "Reports To" Changes
 - One-Time Salary Budget Transfer
 - Position Base Budget Adjustment
- New Position Request
 - Workflow
 - Questionnaire
 - Workload Analysis
- Position Number Information
- Position Management Crosswalk
- FAQs
- Cognos
 - Active Position Report (SACHR025)

About Budget Planning & Administration

Budget Planning & Administration (BPA) supports the campus by estimating and allocating the fiscal resources needed by divisions and programs working to achieve student success and implement imperatives. In collaboration with the University Budget Advisory Committee (UBAC), BPA facilitates a transparent budget development process that considers and makes funding recommendations for the upcoming fiscal year. More specifically, the BPA team analyzes historical and anticipated expenditures, prepares various expense and funding scenarios, and documents budget decisions. BPA also allocates funds in alignment with the approved budget and as received by the Chancellor's Office, monitors expenses and fund balances throughout the year, and effectuates fund transfers as needed and requested by divisions. In addition, BPA serves as a resource across the campus to analyze and make recommendations on the fiscal impact of decisions, such as developing pro-formas for capital projects, reviewing the fiscal health of auxiliaries and self-support organizations, and managing position changes.



Budget Information

[Annual Reports](#)

[Campus Cost Allocation](#)

[General Operating Fund Budget](#)

[University Budget Advisory Committee \(UBAC\)](#)

[Training & Resources](#)

[BPA Forms](#)

Budget Dashboard

[2025-26 Operating Fund Budget - Allocation Summary PDF](#)

General Operating Fund Benefit Rates

[2025-26 Benefit Rates Chart PDF](#)

Position Management Information

[Policy](#)

[Guidelines PDF](#)

[New Position Request Workflow PDF](#)

[Workload Analysis Examples PDF](#)

[Position Number Information PDF](#)

[New Position Questionnaire](#)

[Position Management Crosswalk PDF](#)

[CHRS Position Management \(Video\)](#)

[FAQs PDF](#)

Q & A