NEW POOLED POSITION REQUEST FORM INSTRUCTIONS

Budget Planning & Administration

WHAT IS A POOLED POSITION REQUEST?

A pooled position request creates one or more position numbers for temporary employment types that may be used by multiple employees. **This form is for new temporary pooled positions only.** It may be used for student assistants, teaching associates, graduate assistants, lecturers, casual workers, additional employment, special consultants, and other pooled employment types listed on the form.

Do not use this form for a new permanent staff or MPP position, or for a temporary staff or faculty position that requires a separate individual position number. **Use the applicable new permanent position request process on the BPA website for those requests.**

BEFORE COMPLETING THE FORM

- Confirm that the request is for a temporary pooled position and that the department has funding available for the anticipated salary and applicable benefit costs.
- Use the same form only for position types that share the same department, fund, class code, effective date, and reports-to position. Submit separate forms when these setup or funding details differ.
- Confirm that the reports-to person is in an MPP classification. A faculty member may be listed when serving as a Department Chair or Program Director.
- For Federal Work Study positions, obtain the required award letter. Federal Work Study positions may be funded only by MDS01.

HOW DO I COMPLETE THE FORM?

- **Request Information:** Enter the submitter's name, department, division, and submission date.
- **Pooled Position Type(s):** Select each applicable position type. The form provides the job code and account for each listed type.
- **Position Setup Information:** Enter the fund, department ID, class code when applicable, effective date, reports-to name, and reports-to position number. These details define the position pool.
- **Position Funding Information:** Select all applicable funding types, such as ongoing/base funding, one-time funding, existing position savings, grant or auxiliary funding, or Federal Work Study.
- **Funding Source Detail:** List each funding source supporting the request. Include the funding source or type, fund, department ID, class code, source position number when using existing position savings, amount available, whether the funding is ongoing or one-time, effective date, and any relevant notes. Be as detailed as possible, especially if using multiple funding sources.
- **Funding Confirmation:** The division budget liaison must confirm and approve that the listed funding is available for the anticipated pooled-position costs. BPA will not approve a position request without prior division budget approval.

IMPORTANT FUNDING CONSIDERATIONS

- Pooled positions represent temporary staffing needs and are generally supported with one-time funding. If ongoing or base funding is selected, provide enough detail for BPA to understand the funding plan.

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- The division is responsible for ensuring that the funding source is sufficient for the requested temporary salary and applicable benefits. If funding is not available, the position should not be hired.
- Funding must remain consistent with the selected fund, department ID, and class code. Employees cannot share a pooled position number when the job code, reports-to position, or funding differs.

HOW DO I SUBMIT THE REQUEST?

The **New Pooled Position Request Form** is available on the BPA Forms page as an Adobe Sign workflow. Submit any required supporting documentation to bpa-01@csus.edu. For Federal Work Study requests, include the required award letter. BPA will review the request, confirm the position setup and funding information, and provide the new pooled position number(s) after processing.

WHO IS MY DIVISION BUDGET LIASION?

Adobe workflow routing will require you to enter your Division Budget Liaison in the workflow. Please use the following individuals as Division Budget Liaisons for your division:

- Academic Affairs – Kat Hughes (katherynhughes@csus.edu)
- Administration & Business Affairs – Margaret Hwang (mh227@csus.edu)
- Information Resources & Technology – Michele Vesely (m.vesely@csus.edu)
- People & Climate – Deborah Ceryes (ceryes@csus.edu)
- Student Affairs & Inclusive Excellence – Shannon Ainger (slainger@csus.edu)
- University Advancement – Tatiana Azad (azadt@csus.edu)
- University Affairs - Nicholas Hodge (n.hodge@csus.edu)

RELATED RESOURCES

BPA Forms and position management resources: Budget Planning & Administration website
Position Management Policy Guidelines: Position Management Policy Guidelines