

Instructions for Completing The Position Management Change Form

The Position Management Change Form is a Budget Office document designed to provide information to adjust Position Management and the Budget at the same time. This form is for budget use only, and **does not** replace the forms required by Human Resources and Payroll to adjust their records.

- A separate form is required for each position.
- Two forms are required if the position change involves moving a position between fund sources, (i.e. moving a position from state funded to cash funded).

Important Note:

Please complete this form on a computer so that the formulas will work. The form can be downloaded from the Budget Office home page under forms as an Excel spreadsheet.

Line Item Instructions:

- **Psn #** - Enter the position number that the change(s) is affecting.
- **Date** – Enter the date the form is being prepared.
- **Incumbent** - Enter the current employee's name or "**vacant**" if the position is not filled.
- **Acct #** - Enter the six digit account number(s) being affected by the change.
- **Obj Code** – Enter the four digit object code being affected by the change.
- **Current Balance Row, Base Salary Column**– Enter the current authorized base salary from the position management reconciliation, net of benefits, for the position.
- **Current Balance Row, FTE Column** – Enter the current authorized FTE (Full Time Equivalency) for the position.
- **Adjustment Row, Base Salary Column** – Enter the change or adjustment in this row and column as an increase or decrease to the current base salary.
- **Fringe** – This is a protected field that is formulated to automatically calculate the appropriate fringe benefit rate. Do not try to make an entry here.
- **Ttl Salary** - This is a protected field that will automatically calculate. Do not try to make an entry here.
- **Adjustment Row, FTE Column** – Enter the change or adjustment as an increase or decrease to the current FTE.

- **Description** – Provide a brief description of why the change is being requested.
- **Executive Level** – Budget office entry
- **Schl** – Budget office entry
- **Off-Set Entry** – An off-set entry is used **only** when the position change affects movement of funding other than from authorized position management, (i.e., to or from hourly object codes, OCE object codes or PSA's). These off-set entries are proposed base changes and require the President's approval before the entry can be processed.
- **Bal. After Changes** – This field will calculate the net change for the position, and may not reflect the total for the position. This is a protected field that will automatically calculate. Do not try to make an entry here.
- **Ttl Adjustment** – This is a protected field that will automatically calculate. Do not try to make an entry here. This field must equal zero for all changes.

Lines for notes or additional comments are available on the right side of the form to provide adequate explanations or additional information.

The originator signs and dates the position management change form. Any questions will be directed to this person.

The Dean/Director **authorized** on the account(s) being affected signs and dates the form authorizing the funds and position management changes.

Forward the completed, balanced form to the Budget Office for approval. The President's signature is required on all proposed permanent base transfers.

Questions about completing the form can be addressed to:

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