

Policy Number: 702.1

Policy: Position Management

Effective Date: July 1, 2012

Revision Date:

Responsible Party: University Budget Director

PROCEDURE:

I. New or Revised Positions

- A. With the exception of grant funded positions, new positions are typically requested and approved during the annual budget development cycle. Grant funded new and revised positions are approved by the Grants Accountant in the Financial Services Office in accordance with approved grant terms and conditions.
- B. A Recruitment Authorization Form (RAF) is required to request authorization to start the recruitment process to fill a new or vacant budgeted position. The RAF must be approved by the requesting department, the appropriate dean (if an academic position), the Budget Director, the appropriate vice chancellor, the Chancellor, and the Human Resources Director.
- C. An Employee Transaction Form (ETF) is required to authorize the pay rate and funding source for a new employee or to modify a position. Examples of modifying a position include: changing the source of funding; changing the percentage split for positions paid from more than one index; or increasing/decreasing the budget for a position as a result of a change in appointment percent (FTE), promotion/demotion, reclassification, temporary upgrade, or extra compensation. The ETF must be approved by the requesting department, the appropriate dean (if an academic position), the Budget Director, the appropriate vice chancellor, the Chancellor, and the Human Resources Director.
- D. A Temporary/Student Appointment Form (TSA) is required to authorize pay for a temporary or student employee appointed to a temporary position. A TSA is approved by the requesting department, the appropriate dean, and the Human Resources Director. The Budget Office is generally not part of the approval process for temporary/student appointments.

II. Position Funding Source

- A. Generally the funding source for an existing position remains fixed from year to year. The Budget Office maintains the records of permanent (base) and temporary funding sources for all positions. If a position requires a funding source change due to a budget decision or reassignment to a grant or alternate source, an ETF is created and routed for approval.
- B. When an ETF is received by Budget Office, the pay rate and funding source indicated on the ETF are compared to the position budget per position management records. The Budget Office resolves any discrepancies and if appropriate, approves the ETF. When the fully approved ETF returns to the Budget Office, a permanent or temporary budget adjustment is processed to implement the change.
- C. Vacant positions create salary savings and changes in position budgets may create or use salary savings. (see Budget Policy 702.3 Salary Salvage)

III. Position Budget to Actual monitoring

- A. The Budget Office conducts a monthly review of budget to actual position expenses and requests corrections if discrepancies are identified.

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- B. Fiscal managers should monitor position budgets and expenses. The MSU ReportWeb provides access to reports which provide expenses by pay period and by fiscal year. These reports provide detailed position and payroll data. Finance reports provide summary data regarding position budgets and expenses.

REFERENCES: