California State University **Chico**
University Budget Office

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Position Funding Report Guide

Purpose

The Position Funding Report displays all of the active positions within a Dept ID as well as details regarding the classification of that position, the current incumbent, and the funding chartfields associated with that position.

Process

Navigate to the Position Management page of the University Budget Office website found here:
https://www.csuchico.edu/bud/position-management.shtml

Click on the Position Funding Report hyperlink found under the Procedures & Guides heading

Procedures & Guides

How do I know what positions are available to me?

- Position information including funding chartfields can also be found by using the linked Position Funding Report. This currently active positions and can be filtered by Division or College/Area.

Note: The hyperlink will take you to Box where the Excel spreadsheet is found. When first selecting the file, Box will take you to the online version of Excel where you can preview the spreadsheet but it is recommended you download the spreadsheet as the desktop version of Excel tends to work better (filtering in particular).

Details

The following section will break down the various aspects of the report
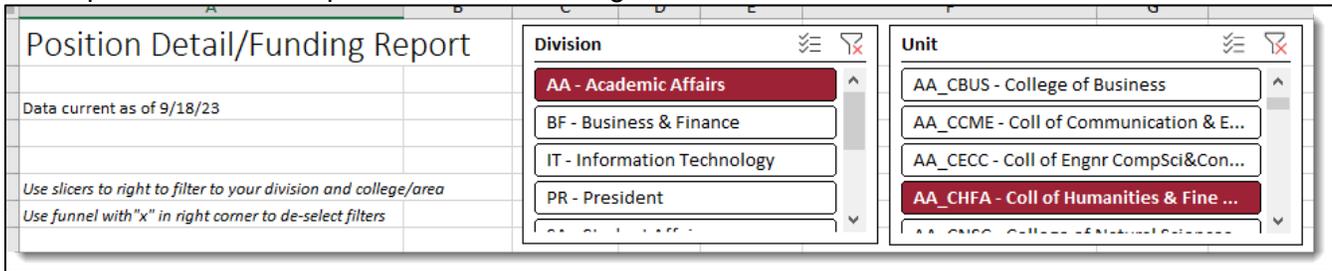
Filters

The report should open without any filters being selected. The top level of the report allows for filtering by Division as well as College/Area/Unit via the Slicer Windows shown below

Position Detail/Funding Report

Data current as of 9/18/23

Use slicers to right to filter to your division and college/area
Use funnel with "x" in right corner to de-select filters

Division

- AA - Academic Affairs
- BF - Business & Finance
- IT - Information Technology
- PR - President

Unit

- AA_LB - Library Services
- AA_PCE - Professional & Continuing E...
- AA_PO - Provost Office
- AA_UE - Undergraduate Education

For example, clicking on the Academic Affairs division and the College of Humanities & Fine Arts Unit will return positions for all Dept IDs under the College of HFA

If you would like to "unfilter" after making a selection, simply click the funnel with the red "x" in the upper right corner.
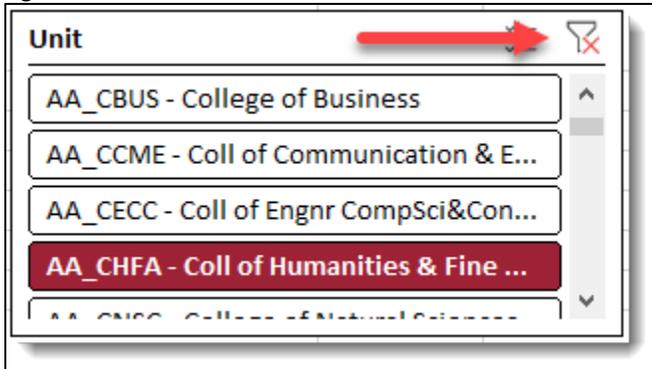
If you are only wanting information for a single Dept ID then you can also filter to that department by using the drop-down menu from the report header.
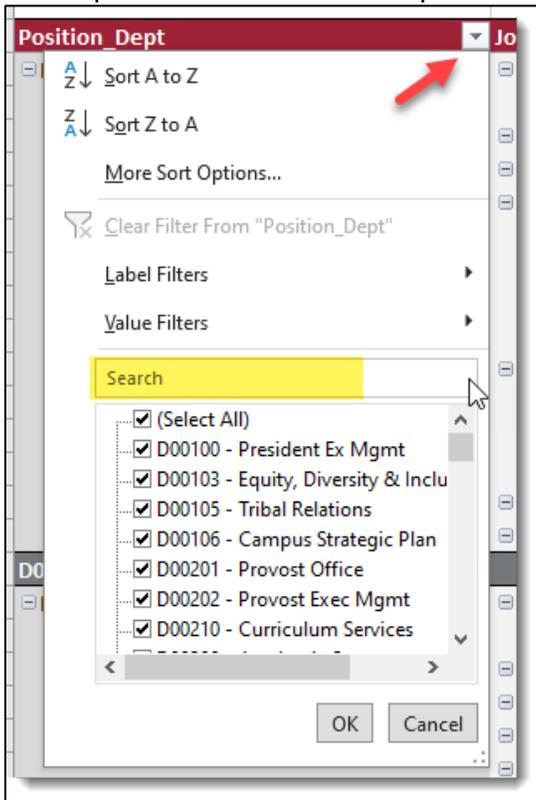
NOTE: The drop-down menu filter in particular tends to be a bit more finicky in the online version of Excel which is why we recommend downloading the file to your desktop in order to use the desktop version of Excel.

Report Information

There are three main categories of information being displayed in this report
1. Position Details (Outlined in blue)
2. Incumbent/Employee (Outlined in green)
3. Position Funding (Outlined in yellow)

Position_Dept	Job Funct	Job Code	Grade	Position	Descr	Empl_ID	Name	Reports To	Fund	Charge_DeptID	Program	Distrb %
D12500 - University Budget Office	MPP	3312	1	00000258	Dir Univ Budget Office	000058904	Anna Magana	00003711	G1006	D12500	-	85.000
		3318	1	00005664	Asst Dir University Budg	002794039	Joshua James	00000258	G1006	D12500	-	100.000
	STF	5287	1	00000400	Budget Analyst	010897277	Marzieh Nikbakht	00000258	G1006	D12500	-	100.000
				00000414	Budget Analyst	-	-	00000258	G1006	D12500	-	100.000
				00005711	Budget Analyst	004950440	Rebecca Joyner	00000258	G1006	D12500	-	100.000

1. Position Details

Position_Dept	Job Funct	Job Code	Grade	Position	Descr	Reports To
D12500 - University Budget Office	MPP	3312	1	00000258	Dir Univ Budget Office	00003711
		3318	1	00005664	Asst Dir University Budg	00000258
	STF	5287	1	00000400	Budget Analyst	00000258
				00000414	Budget Analyst	00000258
				00005711	Budget Analyst	00000258

These fields show attributes related to the position itself.

- **The Position_Dept** is the department the position is housed under in HR but could be different from the funding department depending on if the position has split funding.
- **Job function/category** (MPP vs. staff vs. tenure track, etc.).
- **Position Number** identifies the unique position an employee is placed in.
- **Position classification** (Job Code and Grade) and the description/title of the position.
- **Reports To** position number for that position. In the example above, the bottom four positions all report up to position # 00000258, Director University Budget Office and the Director then reports up to position #00003711 which must be in a separate Dept ID.

2. Incumbent/Employee

Empl_ID	Name
000058904	Anna Magana
002794039	Joshua James
010897277	Marzieh Nikbakht
-	-
004950440	Rebecca Joyner

Above displays the name and employee ID of the individual occupying the position.

3. Position Funding

Fund	Charge_DeptID	Program	Distrb %
G1006	D12500	-	85.000
G1006	D12500	-	100.000
G1006	D12500	-	100.000
G1006	D12500	-	100.000
G1006	D12500	-	100.000

This section shows the details of how the position costs out when payroll is recorded each month. In this case most of the positions cost out to fund G1006, Dept ID D12500 without a program code. The Director position is split funded with 85% of the payroll expense posting to the above mentioned chartfield and 15% is posted elsewhere. If the report had been filtered by that position number rather than Dept ID, the report would display both sides of the funding split.

Summary

The Position Funding Report is meant to assist administrative employees in processing payroll paperwork to find positions available to them in their department and clearly display the details of the position as well as the related funding attributes. This report will be updated monthly after the fiscal month has closed. Please reach out to the University Budget Office at finlcd@csuchico.edu if you have any additional questions.