

**Conflict of Interest
Instructions for
Campus Designated Position List Update Process**

A summary of the process Filing Officers will follow is outlined below:

1. Receive coded memoranda and campus-specific data disk,
2. Review campus "Designated Position List" (Attachment B); determine updates that need to be made,
3. Review the enclosed User Guide before inputting changes in the database,
4. Use the MS Access database to input changes (data disk enclosed),
5. Print a new "Designated Position List" report after inputting changes; review report for accuracy,
6. Print a "Designated Position List Changes" report,
7. Attach job descriptions for new positions, job title changes that include disclosure category changes, and disclosure categories changes, and
8. Place the data disk in the "media protected envelopes" provided and return the disk and copies of the reports and job descriptions no later than Friday, April 13, 2007, to the CSU Office of the Chancellor, Human Resources Administration, attention Pamela Chapin.

Title 2, California Code of Regulations, Section 18750 (e) (1) (D) requires that any amendment to the COI code include "written justification for any changes including all changes in or additions to the designations or disclosure responsibilities." General Counsel has created a list of decision-making responsibilities that campuses may use to help indicate the kind of decision-making authority possessed by employees in designated positions. For convenience, the corresponding letters of each listed item (A through F) may be used as a shorthand method for documentation purposes in the statement of reason section of the database form. However, campuses are asked to provide information sufficient to explain the reason for the designated position list change submitted (refer to Attachment D).

The following chart outlines the information that must be submitted for all substantive position changes:

Type of Change	Attach Job Description	Statement of Reason	Example of Statement of Reason (including shorthand codes)
1. New Position	√	√	D – "Newly created position that makes decisions regarding the purchase of equipment for the campus."
2. Job Title Change (only)	N/A	√	"Job title change only – duties remain the same."
Job Title Change (if duties and disclosure category(ies) also change)	√	√	F – "Job title changed with expanded duties to include responsibility for trust fund investments."
3. Disclosure Category Changes	√	√	A, E – "Duties added to include participation in decision making concerning campus master plan."
4. Eliminated Positions	√ (Required only if position ceases to be designated, but still exists.)	√	"Position eliminated." (If a job has been deleted from list because campus has determined the position no longer meets the COI filing criteria, an explanation must be provided in the Statement of Reason.)