

BP.010.021 – UPDATING PERSONAL SERVICES BUDGETS

Purpose	To review and update position budgets for the next fiscal year.
Description	The Budget tab of the Personal Services Update page displays salary information imported from OneUSG Connect. In addition to salary details, the Budget tab includes fields for entering common raises and adjusting budgets for the upcoming year.
Security Role	BOR_BP_UPDATES
Dependencies/ Constraints	<ul style="list-style-type: none"> User completed all Budget Prep Setup steps. User ran the HCM Import process in Create Report/Run HCM Import mode.
Additional Information	None

Procedure

Below are complete step-by-step instructions on updating Position Budgets using the Personal Services page in Budget Prep Data Update.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the BOR Menus link.
4.	Click the BOR Budget Prep link.
5.	Click the Budget Prep Data Update link.
6.	Click the Personal Services link.
7.	Enter the appropriate Business Unit in the Business Unit field.
8.	Add additional search criteria in the remaining fields to narrow the results returned and click the Search button.
9.	Select one of the search results to update. The system navigates to the Personal Services update page.
10.	If the position is vacant and should be made inactive after the Budget Prep process is complete, select the Inactive checkbox. <i>Note: Budget Prep will not allow filled positions to be inactivated. As Budget Prep does not include data on whether a lump sum position is filled or vacant, lump sum positions cannot be inactivated through Budget Prep.</i>
11.	If Job Data should not be exported for the position, select the Skip checkbox. <i>Note: The Skip checkbox causes the HCM Export process to create Position and Department Budget Table rows for the position but no Job data rows.</i>
12.	If needed update the HR Department for the position using the Department field. <i>Note: Using this option to update HR Department is not recommended – ideally, the department change should be processed through HR and the position re-imported to Budget Prep.</i>
13.	If needed update the Pay Group using the Pay Group field. Confirm the Prom Eff Date, Merit Eff Date, and Equity Eff Date fields updated as expected and that the Proposed Monthly Salary and Proposed Hourly Salary update as appropriate for the new paygroup. <i>Note: Using this option to update Pay Group is not recommended – ideally, this change should be processed through HR and the position re-imported to Budget Prep.</i>

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14.	<p>If needed update the Job Code using the Job Code field.</p> <p>Note: <i>The Official Title field on Position Data will not be updated by this change and needs to be manually updated after Budget Prep is complete. Ideally, this change should be processed through HR and the position re-imported to Budget Prep.</i></p>
15.	<p>If the HCM Import for this position included more than one compensation rate, click the View All link to view data on all compensation entries.</p>
16.	<p>If needed, adjust the raise amount in the Promotion field if the position will be receiving a promotion. Verify the system updates the following fields according to the instructions below:</p> <ul style="list-style-type: none"> • Proposed Salary should increase by the total Promotion amount. • Proposed Budget should update to a prorated amount based on the Prom Eff Date value, adjusted for hours per year from Budget Prep Setup. <p>Note: <i>Positions with a non-zero Promotion amount will create job rows for Action Promotion, Reason Promotion as of the Prom Eff Date value.</i></p>
17.	<p>If needed, adjust the raise amount in the Merit field or the raise percentage in the Merit % field if the position will be receiving a merit increase. Verify the system updates the following fields according to the instructions below:</p> <ul style="list-style-type: none"> • Proposed Salary should increase by the total Merit amount. • Proposed Budget should update to a prorated amount based on the Merit Eff Date value, adjusted for hours per year from Budget Prep Setup. <p>Note: <i>Positions with a non-zero Merit amount will create job rows for Action Pay Rate Change, Reason Merit as of the Merit Eff Date value.</i></p>
18.	<p>If needed, adjust the raise amount in the Equity Adjust field if the position will be receiving an equity adjustment. Verify the system updates the following fields according to the instructions below:</p> <ul style="list-style-type: none"> • Proposed Salary should increase by the total Equity amount. • Proposed Budget should update to a prorated amount based on the Equity Eff Date value, adjusted for hours per year from Budget Prep Setup. <p>Note: <i>Positions with a non-zero Equity amount will create job rows for Action Pay Rate Change, Reason Equity Adjustment as of the Equity Eff Date value.</i></p>

Step	Action
19.	If needed, enter an amount in the Budget Adjust field to further adjust the Proposed Budget. The amount entered will increase or decrease the Proposed Budget with no adjustment for hours per year from Budget Prep Setup.
20.	If the Proposed Budget needs adjusted further, check the Override checkbox to open the Proposed Budget field to direct edits.
21.	If the total Merit % exceeds the maximum raise amount from Budget Prep Setup, select a reason code from the Reason field.
22.	<p>If the compensation rate should not be included in Job data created by Budget Prep, check the Suppress checkbox. Verify the system updates the following fields according to the instructions below:</p> <ul style="list-style-type: none"> • Proposed Salary in the suppressed Compensation entry is equal to zero. • Proposed Budget in the suppressed Compensation entry is equal to zero. • All entered raises in the suppressed Compensation entry are equal to zero. <p>Note 1: Positions with the Suppress checkbox checked will create job rows for Action Pay Rate Change, Reason End Supplemental Pay as of the first effective dated row created.</p> <p>Note 2: REG earn code compensation entries cannot be suppressed.</p>
23.	If a negative value is entered in the Promotion, Merit, or Equity Adjustment fields, the Skip option must be checked before the page can be saved. Updates to Job data including reductions in salary will not be processed through Budget Prep.
24.	Enter notes in the Comments field.
25.	Click the Save button.