BP.010.022 – UPDATING PERSONAL SERVICES FUNDING

Purpose	To review and update Position funding sources for the next fiscal year.
Description	The New Distrib tab of the Personal Services Update page displays funding information imported from OneUSG Connect. Changes made to data on this page affect Department Budget Table entries for the upcoming fiscal year.
Security Role	BOR_BP_UPDATES
Dependencies/ Constraints	- 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 Funding using the Personal Services page in Budget Prep Data Update.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** 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 narrows 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.	Click the **New Distrib** tab to view and edit position funding.
11.	The existing funding row should cover from 7/1 through 6/30 of the fiscal year in development. To add funding for another Earnings Code or split funding for one Earnings Code between multiple Account Codes, click the plus **(+)** button on the right side of the Distribution section.
12.	The **Earnings Code** field should populate with REG by default. Adjust the Earnings Code if needed.
13.	Enter an Account Code in the **Account Code** field. The Funding End Date field automatically updates to include a funding end date if one is set for the Account Code selected.
14.	Enter an amount between 1 and 100 in the **Distribution %** field. This field controls the percent split of funding and should total to 100% for each earnings code in each date range. ***Note 1***: *If the Earnings Code has a corresponding entry on the Budget tab, the Distributed Amount field will update based on the annual rate, distribution % split, and date split.* ***Note 2***: *All Earnings Codes listed on the Budget tab should have entries totaling to 100% for all date ranges entered on the New Distrib Tab. Additional Earnings Codes can be added but will have no associated budget amount.*

Step	Action
15.	If a row of funding should not fund specific fringes, select a Fringe Group in the **Ex Fringe Group** field to control which fringes will be redirected.
16.	Enter an Account Code in the **Redirect Code** field. The Redirect Code entry must be different from the Account Code field entry. The Redirect Code field should be left blank if no fringes are selected to redirect.
17.	If funding should be split by date, adjust the date in the **End Date** field to end the current row one day before new funding should take effect. *Note: The HCM Export process will create Department Budget Table rows for every Start Date listed after Budget Prep is complete.*
18.	Click the plus **(+)** button to the right of End Date field to add a new date range. The new row will be created with the Start Date populated with the day after the prior row's End Date. *Note: In the event the Start Date on a row needs edited, it may be necessary to temporarily change the end date or distribution % on rows to force the Distributed Amount to recalculate. The end date or distribution % can be returned to the correct value after forcing the recalculation in this way.*
19.	Enter Distribution rows for REG and any Earnings Codes included on the Budget page. The Distributed Amount field for each row will update after the Earnings Code, Account Code, and Distribution % fields are filled. *Note: Date ranges should cover all days between 7/1 and 6/30 of the fiscal year in development, and distribution % should total to 100% within each date range.*
20.	Click the **Save** button.