

BP.010.023 – UPDATING PERSONAL SERVICES FRINGE BUDGETS

Purpose	To adjust fringe budget estimates produced by the Fringe Update process.
Description	The Fringe Update process populates the Fringes tab in Personal Services with estimated fringes based on imported health and retirement elections. The Fringes tab allows users to review and, if necessary, adjust fringe budget amounts to account for non-standard needs.
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. • User ran the Fringe Update process.
Additional Information	The Fringes page controls budgeted amounts only. Changes made to the Fringe page do not affect benefit elections in OneUSG Connect.

Procedure

Below are complete step-by-step instructions on updating Fringe 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 search results to update. The system navigates to the Personal Services update page.
10.	Click the Fringes tab to view and edit Fringe budgets.
11.	Review rows created by the Fringe Update process for accuracy. No rows should have been created if the position has a zero budget.
12.	If the budget for a specific fringe needs updated, update the Current Amount field with the new value and select the Lockout checkbox. The Lockout option keeps the manually updated value from being adjusted by the Fringe Update process. <i>Note: Manual adjustments are most common on FICA entries for Lump Sum positions with budgets that exceed the FICA Maximum from setup.</i>
13.	To manually add a fringe entry, click the plus (+) button to the right of an existing fringe entry.
14.	Enter an Account in the Account field. Valid accounts are limited to ORG level accounts in the Personal Services (5xxxxx) range.
15.	Enter a Fund in the Fund Code field.
16.	Enter a Department in the Department field.
17.	Enter a Program Code in the Program Code field.
18.	Enter a Class in the Class Field .
19.	If appropriate, enter a Project ID in the Project field.
20.	Select a Fringe Type from the Fringe Type field.

Step	Action
21.	Enter the desired budget amount in the Current Amount field.
22.	Select the Lockout option. Manually entered rows will be deleted by future instances of the Fringe Update process if the Lockout option is not selected.
23.	Click the Save button.