

Mini Budget Training

How to balance your budget in 10 easy steps:

1. Receive your allocation (hard copy & spreadsheet)
2. Enter all unclassified salary information in the budget On-Line Entry area
3. Enter all student increases in the budget On-Line Entry area
4. Enter your GTA waiver increase in the On-Line Entry area (academic areas only)
5. Review all classified data for accuracy. Mark all changes on a hard copy of the position listing and submit it to the Budget Office
6. Record any changes you made to your allocation on the spreadsheet version of your allocation – especially if you moved money from one category to another (remember to account for the difference in benefits)
7. Wait overnight as the data from the budget On-Line Entry area is copied back to the main budget database
8. The next day: Order a Balancing Report (WBUD632)
9. Compare the information on the Balancing Report to the purple “Final Budget Allocation” line on your modified spreadsheet.
10. If all of the data matches – you are balanced. If it does not, then you probably entered something incorrectly in either the On-Line Entry area or on your balancing spreadsheet.

How to complete a PER-36, Position Data Sheet, and establish a new position

1. Go to the HR website and download the PER-36 form
2. Fill out the form with all of the required fields
3. If it will be a budgeted position, write a letter to the Budget Director containing the following: 1) How the position will be funded in the budget (RU/GU), 2) A request for FTE from the central pool – if needed – or details on where the FTE is coming from in your budget, and 3) If GU funded, how your base budget will be realigned to pay for the new position – where the money will be coming from in the budget to fund it.
4. Attach the PER-36 to the letter and send it to the Budget Office
5. The Budget Office will provide the new position number to you and will also send it to HR.

Do's

- ◆ Remember to use the budget On-Line Entry area to add your student salary increases to your student lines
- ◆ Remember to use the budget On-Line Entry area to add your GTA waiver increases to your OOE waiver line (academic units only)
- ◆ Enter GU salaries off of each person's contract or at least check the contracts against what you enter into the system
- ◆ Use correction mode if you want to change the funding on the “0” record of a position in the budget On-Line Entry area
- ◆ Back out of the budget On-Line Entry area without saving and start over if you get an error
- ◆ Remember to order all of your budget reports for the **budget** year
- ◆ Help us by only sending us pages of your position listing that have changes written on them
- ◆ Send both us and HR paperwork if it involves the management of a position (establishing a new position, moving it to another department, etc.)
- ◆ Remember to account for the difference in benefits when moving money from one category to another

Don'ts

- ◆ Attempt to put “new”, upcoming fiscal year money on the first proof.
- ◆ Send us information via the Trans Notes area in the budget On-Line Entry area
- ◆ Attempt to use or order reports from the budget On-Line Entry area after it has been closed
- ◆ Try to switch a position from budgeted (regular) to non-budgeted (temporary)
- ◆ Hesitate to call!

KANSAS STATE UNIVERSITY
POSITION DATA SHEET (Classified and Unclassified Employees)

EMPLOYEE NAME:		SOC SEC #	
----------------	--	-----------	--

(first, middle, last)

DEPARTMENT ID	DEPARTMENT NAME	EMPLOYEE ID	RCD #

ADD	UPDATE	CORRECT/ SUPERCEDE	INACTIVATE	POSITION NUMBER <small>(system generated if add)</small>
------------	--------	-----------------------	------------	---

EFFECTIVE DATE:		REASON:	NEW	REPORTS TO:	
------------------------	--	----------------	------------	--------------------	--

TITLE <small>(optional – will override Job Title in Campus Phonebook):</small>	
LONG DESCRIPTION:	

COMPANY:	SOKS	DEPARTMENT ID:	
DEPARTMENT NAME:			

JOB CODE:		JOB TITLE:			
REGULAR	TEMPORARY	FULL-TIME	PART-TIME		
<small>(Budgeted)</small>		<small>(Non-Budgeted)</small>			

MAIL DROP ID:		WORK PHONE:			
BUDGETED POSITION		CONFIDENTIAL POSITION		POSITION POOL ID:	
CLASSIFIED:	UNCLASSIFIED:	FTE:			
ACADEMIC RANK: 001-Professor 002-Assoc Prof 003-Asst Prof 004-Instructor None					

COUNTY:		HOLIDAY SCHEDULE:		WORK SCHEDULE:	
----------------	--	--------------------------	--	-----------------------	--

FLSA STATUS: Exempt		Non-Exempt		DESIGNATED/COMMERCIAL:	
----------------------------	--	------------	--	-------------------------------	--

APPT BASIS: 9-month		12-month		PAY GROUP:		EMP TYPE:	
----------------------------	--	----------	--	-------------------	--	------------------	--

SUPERVISORY:		SSI DESIGNEE:		CIP CODE:	
---------------------	--	----------------------	--	------------------	--

Additional Information:

FUNDING INFORMATION: Updated by Departments in HRIS. **For department use only.**

PROJECT #	PROJECT DESCRIPTION	FUND SOURCE	ORG	AWARD (If applicable)	FTE	ANNUAL AMT

EMPLOYEE SIGNATURE (if required)

DATE

SIGNATURE(S) OF UNIT OR DEPARTMENT HEAD, DEAN, AND/OR VICE PRESIDENT

DATE