

PeopleSoft

KUMC

**Budget Information
Procedural Reference**

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OVERVIEW

General Information

The budget system stores permanent and temporary funding information for all positions in the current fiscal year.

The position information panel has three sections of information. The top section contains demographic information related to the position. The middle section displays the permanent funding and includes fringe and shrinkage associated with a position as well as temporary funding changes. The bottom section displays the status of the cash available for the position

There are several types of positions. In addition to filled positions, the budget system stores data for unallocated positions, other operating expenditures (OOE), telephone and networking (TEL) and others. See appendix pg 12 for a list of position prefixes and their definitions.

Position Categories and Sub-Categories

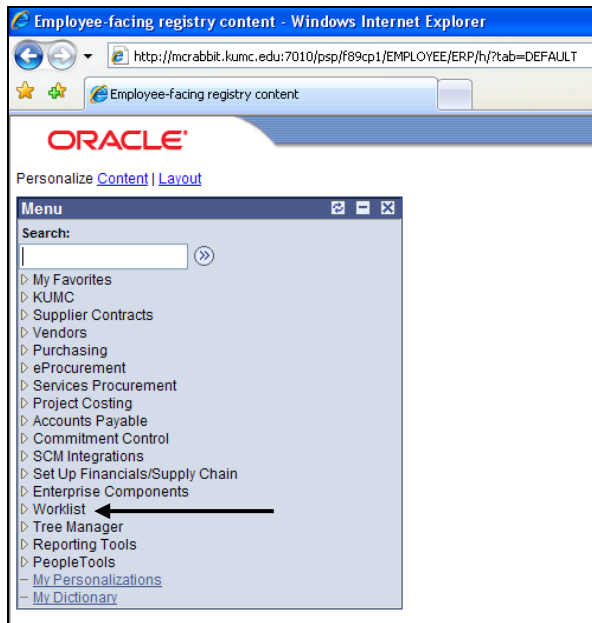
Each position in the budget system is placed into a category. The associated funding is further identified with a sub category. These designations describe the type of position. For example, CREG is the sub category for Classified Regular. STMP is the sub category for Student Temporary Help. For a complete list see appendix page 13 .

Release Lines Panel

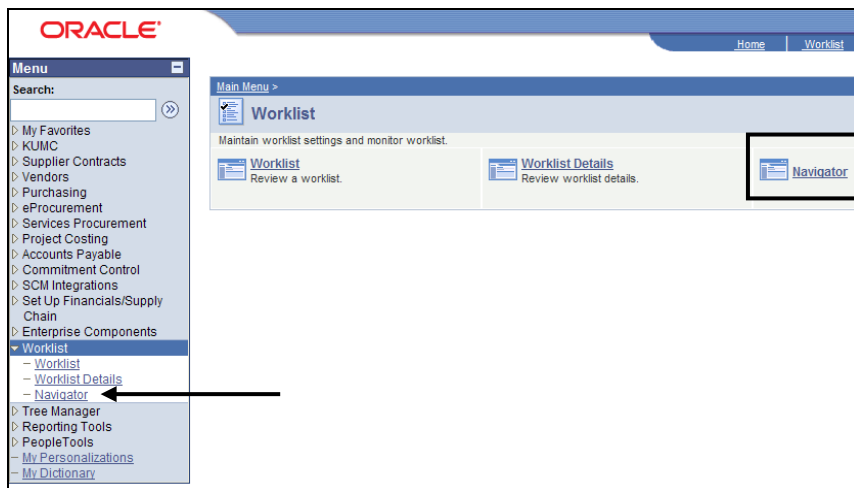
The release lines panel will display any funding associated with the position that has been released for temporary use. Normally this is used when a position is partially funded by a grant which will end during the fiscal year. Having funds set aside in a release line ensures that monies will be on hand to pay the employee's salary once the grant funding is no longer available. If a temporary BAF has been processed against a release line, the amount will display in the Temp FY Amount column.

DISPLAYING THE NAVIGATION ICONS

Navigation



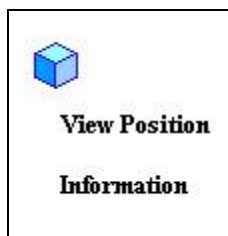
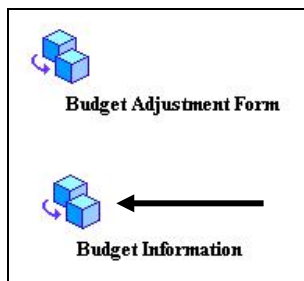
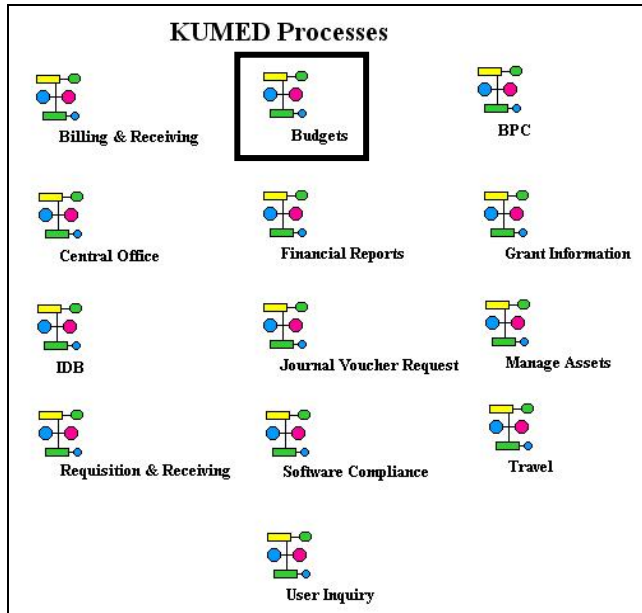
1. Log on to PeopleSoft Financials.
2. Click **Worklist** in the menu.



3. Click **Navigator** icon or menu item.

VIEW POSITION INFORMATION

Navigation



1. Click **Budgets** icon.
2. Click **Budget Information** icon.
3. Click **View Position Information** icon.

VIEW POSITION INFORMATION

Selection Criteria

View Position Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: =

Primary Org Number: begins with

Position Number: begins with

EmplID: begins with

Name: begins with

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

1. Enter desired search criteria.
[Primary Org Number = Department number]

Do not search without criteria.
2. Click .

View Position Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: =

Primary Org Number: begins with

Position Number: begins with

EmplID: begins with

Name: begins with

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results
view All First Last

| Business Unit | Primary Org Number | Position Number | EmplID | Name |
|---------------|--------------------|-----------------|-------------|----------------|
| KUMED | 01501 | J0101010 | (blank) | (blank) |
| KUMED | 01501 | J0111111 | J0000011111 | Cool.Really |
| KUMED | 01501 | J0222222 | J0000022222 | Thoughts.Happy |
| KUMED | 01501 | J0333333 | J0000033333 | Fun.What |
| KUMED | 01501 | J0444444 | M0000044444 | Way.Your |
| KUMED | 01501 | J0555555 | (blank) | (blank) |
| KUMED | 01501 | O0E01501 | (blank) | (blank) |
| KUMED | 01501 | TEL01501 | (blank) | (blank) |
| KUMED | 01501 | UUN01501 | (blank) | (blank) |


Depending on the search criteria, PeopleSoft may display a list of positions to choose from.

Select the desired position from the list.

If only one position is returned for the search criteria, PeopleSoft displays the View Position Information panel.

VIEW POSITION INFORMATION

Demographics section

| Position Information | | Release Lines | |
|---|-------------------------------|--|--|
| Busn Unit | KUMED | Comments | |
| Prime Org | 01501 | Budget Office | |
| Position | J0111111 | Working Title | INFORMATION SPECIALIST I |
| Job Code | 088700 | Information Specialist I | |
| Name | Cool,Really | EmplID | J0000011111 |
| Comp Rate | 1923.85 | KU FTE | 1.00 |
| | | Full Time | Regular |
| | | | <input type="checkbox"/> Control Total Administrator |
| Job Effdt | 03/20/2011 | Empl Status | A - Active |
| | | Empl Class | U - UnclProSt |
| | | Grade/Step | 001 0 |
|  | Last Modified | Position(s) Held by Employee | |

The demographic information displayed comes from the PeopleSoft HR system. The Prime Org number is the department number associated with the position. That is followed by the department name.

The next few fields are identifying information: the position number, its working title, the position's job code followed by the job code description. The name field displays the current incumbent name. If the position is unfilled, VACANT is displayed.

The Comp Rate field displays the compensation paid to the employee either biweekly or hourly depending on the employee's compensation frequency.

KU FTE (full time equivalent) indicates whether the position is full time or part time. Following the full time/part time description is the regular/temporary indication of the position. The Control Total Administrator check box is used by the Budget Office to denote positions with special handling during the Budget Cycle in June.

The Job Effdt displays the last date that a transaction occurred on this employee in the HR system. This is followed by the Employee Status and Class. If the position is a classified position, there will be related Grade and Step values. All Unclassified positions show 001 and 0 for Grade/Step.

The Position(s) Held by Employee link displays a page with all positions held by this employee, including the one currently displayed. You may need to use View All on the page to see additional positions.

Comments are used by the Budget Office to document changes to the position.

VIEW POSITION INFORMATION

Position budget section

| Position's Budget | | | | | | | | | | | |
|-------------------------------|-----------|---------------|--------------------------------|-------------|---------------------|---------------------|------------------------|--------------|----------------|-----------------|--|
| Sub Cat | SpeedType | | Dept Id | % Distrib | Annual Budget | Annual Fringe | Annual Shrinkage | Annual Total | Temp FY Amount | ▶ Fringe Detail | |
| UREG | APP01501 | Budget Office | Addl Chartflds | 01501 | 100.00 | 50,020.00 | 15,533.66 | -2,189.49 | 63,364.17 | 0.00 | |
| <u>Position Budget Totals</u> | | Budget Period | | Distr Total | Annual Budget Total | Annual Fringe Total | Annual Shrinkage Total | Annual Total | Temp FY Total | ▶ Fringe Total | |
| | | 2011 | | 100.00 | 50,020.00 | 15,533.66 | -2,189.49 | 63,364.17 | 0.00 | | |

The Position's Budget section displays the current PERMANENT funding for the position.

Each row includes the Sub Category of the funding followed by the Speedtype , the SpeedType description and the SpeedType Department. The % Distrib column indicates the percent of the salary paid by this SpeedType. Annual Budget is the annual salary paid by this SpeedType. This is followed by the Fringe and Shrinkage amounts and the total of the three fields.

The Addl Chartflds link is only for School of Medicine administration use.

The Temp FY Amount field shows temporary adjustments for the current fiscal year. This value does not include fringe. This amount is the prorated amount based on the transaction date of the BAF. e.g. A temporary BAF for 10,000.00 with an effective date in the first pay period results in a different Temp FY Amount (10,000.00) than a temporary BAF for 10,000.00 with an effective date in the 24th pay period (769.00).

The Position Budget Totals line adds up all SpeedTypes for the position.

To the right of each SpeedType line is a triangle icon which can be used to expand the Fringe Detail. Individual fringe benefits are listed by name followed by the related amount. To the right of Fringe Detail is Fringe Projection, which includes shrinkage in the total.

| Fringe Detail | |
|---------------|------------------|
| GHI Avg | 6,365.00 |
| Medicare | 725.29 |
| OASDI | 3,101.24 |
| Retirement | 4,751.90 |
| StateLeave | 285.11 |
| UCI | 80.03 |
| WCI | 225.09 |
| Total | 15,533.66 |

VIEW POSITION INFORMATION

Position budget section *(continued)*

Position with temporary funding

| Position's Budget | | | | | | | | | | | |
|-------------------------------|-----------|----------------------|--------------------------------|--------------------|----------------------------|----------------------------|-------------------------------|---------------------|----------------------|-----------------------|-----------------|
| Sub Cat | SpeedType | | Dept Id | % Distrib | Annual Budget | Annual Fringe | Annual Shrinkage | Annual Total | Temp FY Amount | ▶ Fringe Detail | |
| UREG | APP01501 | Budget Office | Addl Chartflds | 01501 | 64.87 | 23,969.00 | 8,522.50 | -1,085.22 | 31,406.28 | 0.00 | |
| UREG | FEE01511 | Bud Off Res-Gen Fees | Addl Chartflds | 01511 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8,488.88 | ▶ Fringe Detail |
| UREG | ROV01501 | Budget Office | Addl Chartflds | 01501 | 35.13 | 12,983.00 | 4,615.80 | 0.00 | 17,598.80 | -8,488.88 | ▶ Fringe Detail |
| Position Budget Totals | | Budget Period | | Distr Total | Annual Budget Total | Annual Fringe Total | Annual Shrinkage Total | Annual Total | Temp FY Total | ▶ Fringe Total | |
| | | 2011 | | 100.00 | 36,952.00 | 13,138.30 | -1,085.22 | 49,005.08 | 0.00 | | |

This position began the fiscal year funded 64.87% by APP and 35.13% by ROV. A temporary funding change was made to decrease the amount funded by ROV. That amount is now funded by FEE.

Position funded by multiple SpeedTypes

| Position's Budget | | | | | | | | | | | |
|-------------------------------|-----------|----------------------|--------------------------------|--------------------|----------------------------|----------------------------|-------------------------------|---------------------|----------------------|-----------------------|-----------------|
| Sub Cat | SpeedType | | Dept Id | % Distrib | Annual Budget | Annual Fringe | Annual Shrinkage | Annual Total | Temp FY Amount | ▶ Fringe Detail | |
| UREG | APP01501 | Budget Office | Addl Chartflds | 01501 | 93.99 | 57,119.00 | 16,452.39 | -2,457.28 | 71,114.11 | 0.00 | |
| UREG | ROV01501 | Budget Office | Addl Chartflds | 01501 | 6.01 | 3,651.00 | 1,051.77 | 0.00 | 4,702.77 | 0.00 | ▶ Fringe Detail |
| Position Budget Totals | | Budget Period | | Distr Total | Annual Budget Total | Annual Fringe Total | Annual Shrinkage Total | Annual Total | Temp FY Total | ▶ Fringe Total | |
| | | 2011 | | 100.00 | 60,770.00 | 17,504.16 | -2,457.28 | 75,816.88 | 0.00 | | |

New unfunded position

| Position's Budget | | | | | | | | | | |
|-------------------------------|-----------|----------------------|--------------------------------|--------------------|----------------------------|----------------------------|-------------------------------|---------------------|----------------------|-----------------------|
| Sub Cat | SpeedType | | Dept Id | % Distrib | Annual Budget | Annual Fringe | Annual Shrinkage | Annual Total | Temp FY Amount | ▶ Fringe Detail |
| | | | Addl Chartflds | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Position Budget Totals | | Budget Period | | Distr Total | Annual Budget Total | Annual Fringe Total | Annual Shrinkage Total | Annual Total | Temp FY Total | ▶ Fringe Total |
| | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |

VIEW POSITION INFORMATION

Cash available section

| ▶ Cash Available | | | | |
|------------------------------|---------------|-------------------|-----------------------|----------------------|
| | Budget Period | Cash Budget Total | Payroll Actuals Total | Cash Available Total |
| Cash Available Totals | 2011 | 63,364.17 | 51,043.44 | 12,320.73 |

This section show the actual amount paid to the position from all funding sources as of the last processed pay period and the resulting Cash Available Total.

If the position is funded from multiple SpeedTypes, the individual cash lines can be displayed by clicking the triangle icon next to the Cash Available label.



| ▶ Cash Available | | | | |
|------------------------------|---------------|-------------------|-----------------------|----------------------|
| | Budget Period | Cash Budget Total | Payroll Actuals Total | Cash Available Total |
| Cash Available Totals | 2011 | 75,816.88 | 68,614.52 | 7,202.36 |

| ▼ Cash Available Find First 1-2 of 2 Last | | | | |
|--|---------------|-------------------|----------------------------|----------------------|
| SpeedType | Budget Office | Cash Budget | Payroll Actuals YTD Amount | Cash Available |
| APP01501 | Budget Office | 71,114.11 | 66,994.37 | 4,119.74 |
| ROV01501 | Budget Office | 4,702.77 | 1,620.15 | 3,082.62 |
| | | | | |
| Cash Available Totals | Budget Period | Cash Budget Total | Payroll Actuals Total | Cash Available Total |
| | 2011 | 75,816.88 | 68,614.52 | 7,202.36 |

VIEW POSITION INFORMATION

Release Lines

| Position Information | | Release Lines | | | | | | | | | |
|--|---------------|-------------------------------|--|---------------------|------------------------|------------------|---------------|----------------|---------------|------|--|
| Busn Unit | KUMED | Comments | <input type="text"/> | | | | | | | | |
| Prime Org | 01501 | Budget Office | | | | | | | | | |
| Position | J0111111 | Working Title | INFORMATION SPECIALIST I | | | | | | | | |
| Job Code | 088700 | Information Specialist I | | | | | | | | | |
| Name | Cool,Really | EmplID | J0000011111 | | | | | | | | |
| Comp Rate | 1923.85 | KU FTE | 1.00 | | | | | | | | |
| | | Full Time | Regular | | | | | | | | |
| | | | <input type="checkbox"/> Control Total Administrator | | | | | | | | |
| Job Effdt | 03/20/2011 | Empl Status | A - Active | | | | | | | | |
| | | Empl Class | U - UnclProSt | | | | | | | | |
| | | Grade/Step | 001 0 | | | | | | | | |
| Position's Budget - Release Lines | | | | | | | | | | | |
| Sub Cat | SpeedType | Dept Id | % Distrib | Annual Budget | Annual Fringe | Annual Shrinkage | Annual Total | Temp FY Amount | Fringe Detail | | |
| FREL | APP01501 | Budget Office Release Time | Addl Chartflds | 11429 | 0.00 | 7,371.00 | 787.00 | -272.48 | 7,885.52 | 0.00 | |
| Release Line Totals | Budget Period | Distr Total | Annual Budget Total | Annual Fringe Total | Annual Shrinkage Total | Annual Total | Temp FY Total | Fringe Total | | | |
| | | 0.00 | 7,371.00 | 787.00 | -272.48 | 7,885.52 | 0.00 | | | | |
| Cash Available - Release Lines | | | | | | | | | | | |
| Cash Available Totals | Budget Period | Cash Available Total | | | | | | | | | |
| | | 7,885.52 | | | | | | | | | |

The release lines panel will display any funding associated with the position that has been released for temporary use. If a temporary BAF has been processed against a release line, the amount will display in the Temp FY Amount column. Note that there is also a cash available section on this page.

APPENDIX

Position Prefixes

| Positions without employees | |
|------------------------------------|--------------------------------|
| Prefix | Description |
| AGI | Ctr on Aging Interest |
| AGP | Ctr on Aging Principal |
| CUN | Classified Unallocated Line |
| DBT | Debt Service |
| FUN | Faculty Unallocated |
| HLD | Hold Position |
| HUN | Hlth Care Worker Unallocated |
| LNG | Classified Longevity |
| MAL | Resident Malpractice |
| N2D | Classified Hourly Incentive N2 |
| NXP | Non-Expense Items (7000) |
| OOE | Contractual Services (2000) |
| OVT | Classified Overtime |
| PRI | Classified Police Reten Incent |
| RUN | Resident Unallocated Line |
| SDF | Classified Shift Differential |
| STH | Student Help Unallocated Line |
| STI | Student Aid / Contracts (5000) |
| TEL | Telephone & Networking (2005) |
| UUN | Unclassified Unallocated Line |

APPENDIX

Budget Categories and Sub Categories

| Category | Sub Category | Descr |
|----------|--------------|--------------------------------|
| CLA | CHLD | Classified Holding Line |
| CLA | CLNG | Classified Longevity |
| CLA | COVT | Classified Overtime |
| CLA | CPRI | Classified Police Reten Incent |
| CLA | CPRT | Classified Police Retirement |
| CLA | CREG | Classified Regular |
| CLA | CSDF | Classified Shift Differential |
| CLA | CSN2 | Classified Hourly Incentive N2 |
| CLA | CTMP | Classified Temporary |
| CLA | CUNA | Classified Unallocated Line |
| DBT | AGEI | Ctr on Aging Interest |
| DBT | AGEP | Ctr on Aging Principal |
| DBT | DEBT | Debt Service |
| DBT | ECON | Energy Conservation |
| DIS | DISB | Disability |
| FAC | FCAP | Faculty Admin Cap |
| FAC | FDPR | Faculty Distinguish Professor |
| FAC | FFLX | Faculty Flexible Compensation |
| FAC | FHLD | Faculty Holding Line |
| FAC | FLAW | Faculty Lawrence Payroll |
| FAC | FREG | Faculty Regular |
| FAC | FREL | Faculty Release Time Line |
| FAC | FSUP | Faculty Supplemental |
| FAC | FTMP | Faculty Temporary |
| FAC | FUNA | Faculty Unallocated Line |
| HCW | HCWN | Hlth Care Worker - Nurse |
| HCW | HCWR | Hlth Care Worker - No Nurse |

| Category | Sub Category | Descr |
|----------|--------------|--------------------------------|
| HCW | HTMP | Hlth Care Worker Temporary |
| HCW | HUNA | Hlth Care Worker Unallocated |
| MSC | MISC | Misc section of Control Totals |
| OOE | MALP | Resident Malpractice |
| OOE | NEXP | Non-Expense Items (7000) |
| OOE | ONEW | New Program |
| OOE | OREG | Contractual Services (2000) |
| OOE | OTEL | Telephone & Networking (2005) |
| OOE | STIP | Student Aid / Contracts (5000) |
| RES | RHAP | KU Hospital 19.5 positions |
| RES | RKUH | KU Hospital 15.5 positions |
| RES | RREG | Resident (Housestaff) Regular |
| RES | RSPC | FY08 KUH Funded Lines |
| RES | RTMP | Resident Temporary |
| RES | RUNA | Resident Unallocated Line |
| STH | SHLP | Student Help Unallocated Line |
| STH | STMP | Student Help Temporary |
| UNC | UCAP | Unclassified Admin Cap |
| UNC | UDPR | Unclassified Distinguish Prof |
| UNC | UHLD | Unclassified Holding Line |
| UNC | UHPA | Unclassified Hospital Payroll |
| UNC | ULAW | Unclassified Lawrence Payroll |
| UNC | UREG | Unclassified Regular |
| UNC | USUP | Unclassified Supplemental |
| UNC | UTMP | Unclassified Temporary |
| UNC | UUNA | Unclassified Unallocated Line |

APPENDIX

Assistance

Using PeopleSoft Budget Panels

Questions regarding how to utilize the PeopleSoft Budget panels should be directed to PeopleSoft Support at ext. **8-1121**.

The office is usually staffed from 8:00 AM to 4:30 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and we will return your call.

Budget Policy or Data

Policy questions regarding Budget Policy or data should be directed to your assigned Budget Analyst in the Budget Office, either Michelle Laundry at ext. 8-2001, Richard Murrell at ext. 8-5269. If you are unable to reach your assigned Budget Analyst, you may call extension 8-5225 to leave a message.

The office is usually staffed from 8:00 AM to 5:00 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and they will return your call.