Date: March 29, 2012

To: Budget Prep Users

From: Arley Williams A.W.
Assistant Vice President for Budget and Institutional Analysis

Subject: Budget Preparation Information and Instructions

The Budget Office is currently initializing the Budget Preparation System (Budget Prep) for each division. The system is currently available on PISTOL in a read-only format. We will make the system available for updating on Monday, April 2, 2012, and fiscal personnel in your unit can begin making changes to your budget. All budget changes must be completed by May 4, 2012. Please be sure each Section I position is fully budgeted and the total division cap has been scheduled. **No salary adjustments are to be made in Budget Prep.** If an employee’s salary needs to be adjusted for any reason, please submit a Job Data Change Form. If you have questions about the system or need account/grant numbers added, please contact Peggi Duell in the Budget Office at 6-2541.

**General Instructions**

1. **Both Section I and Section II budgets should be checked and, if appropriate, adjusted.** Please check the Position Funding on all positions (full-time salaries) and the Account Master (part-time salaries, GA’s, support, etc.). If there are accounts in the Account Master that are no longer being used or valid accounts are missing, please contact the Budget Office at 6-2541.

2. The Budget Office has established budget caps for each division. The budget caps only apply to Section I; there is no cap on the amounts entered for Section II. **If your unit prepared Section II budget templates, then those amounts should be entered in Budget Prep.** Questions regarding the Section I cap for your division should be directed to Peggi Duell at 6-2541.

3. If you have vacant staff positions that are currently over-budgeted and no funds have been taken for Central Salary Management (CSM), please do not reduce the budgeted amount. The excess budget will need to be available when you fill the position to comply with the CSM policy.

4. The Budget Prep System will be updated by the Budget Office for faculty and academic professional promotions when decisions have been finalized.

5. For new employees other than staff, the hiring unit must submit a Benefited Hiring Form before the employee line will appear in the Budget Prep System. For new staff, the hiring
unit must have completed the recruiting process with a job offer being accepted and approved.

6. The Budget Prep System will be shut down at 5:00 p.m. on May 4, 2012.

7. For employees who are currently on temporary salary increases:
   a. For Classified Staff, please enter the base salary in the Budget Prep System. You may budget for the base salary or the amount needed for the increase. Prior to the July payroll deadline, a Job Data Change Form must be submitted to continue a temporary salary increase for classified staff.
   b. For Academic Professionals and Faculty, you may enter the base salary or the salary including the temporary increase. If you enter the base salary, you will need to submit a Job Data Change Form for the temporary increase prior to the July payroll deadline. If you enter a salary that includes the temporary increase, please go to the second tab on the “Position Funding” page and enter the base salary.

8. For employees on academic-year appointments who are terminating employment, please indicate the balance of contract to be paid and termination date in the comments section of the Budget Prep System.

9. Any benefited employee hired after May 4, 2012 will require: (1) a Benefited Hiring Form or (2) a completed recruiting process with all approvals for FY 2012. Funding information for these employees must be entered into HRMS for FY 2013.

10. Employees who are paid from two divisions are set up in the Budget Prep system with each division responsible for a percent of the salary. Please work with the division which is funding the other portion of the employee salary to determine the funding split. If the percent that each division is responsible for needs to be changed, please contact Peggi Duell.

11. If there are charges for mobile communications devices being charged to any of your accounts, please be sure that there are funds available in the B1200 pool to cover these charges for the year.

12. If you have an employee who has been approved to go on sabbatical or leave-without-pay, but subsequently does not go on leave, please complete a Job Data Change Form to reinstate their pay.

Please don’t wait until the last minute to make changes to your 2013 budget. If you run into problems or have problems with the system, it may take some time to correct. Please feel free to call the Budget Office at 6-2541 with any problems or comments.

As a general reminder, as we come toward the end of the fiscal year, closely monitor balances in your state accounts and correct anticipated negative balances.