



Position Budget Adjustments (PBA)

By Budget Planning & Analysis
October 2024

The Process to Adjust Position Budgets

- **Things to Consider**
- **Five Principles**
- **Tools**
 - Questica Dashboard
 - Position Budget Adjustment Form
- **Four Examples**
 - Permanent Transfers (2)
 - Temporary Transfers (2)
- **Demo**
- **Q&A**

Things to Consider

- **Who Should Prepare and Submit Position Budget Adjustments (PBA)?**
 - Only individuals who are responsible for managing budgets for Staff, Faculty, and MPP positions.
 - Student employee positions are funded at the General Ledger (GL) level not at the position level.
- **When should a PBA be submitted?**
 - To fund positions prior to personnel actions taking effect.
 - To redirect salary savings.
- **Best Practices**
 - Keep position single-funded whenever possible.
 - Including budget scenarios
 - Funding a position with both Original and Adjustment budgets creates split funding.

Five Principles

PBA Principle #1

Two components are required to fund a position: **the position's entire budget**, and the **Position Allocation (chartfield string)**. If either one is **zero**, the position is **not funded**. Change either one or both to change a position's funding.

Position Budget
(Wage Adjustment)

Position Allocation

Position is NOT funded if either one is zero

PBA Principle #2

When entering a position's current budget and new budget in the PBA, always use the *total* budget.

Position Budget Adjustment ("Wage Adjustment")			
input	input	input	auto calc
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$
00001111	70,000.00	80,000.00	10,000.00
00002222	100,000.00	90,000.00	(10,000.00)

Total Budget is required

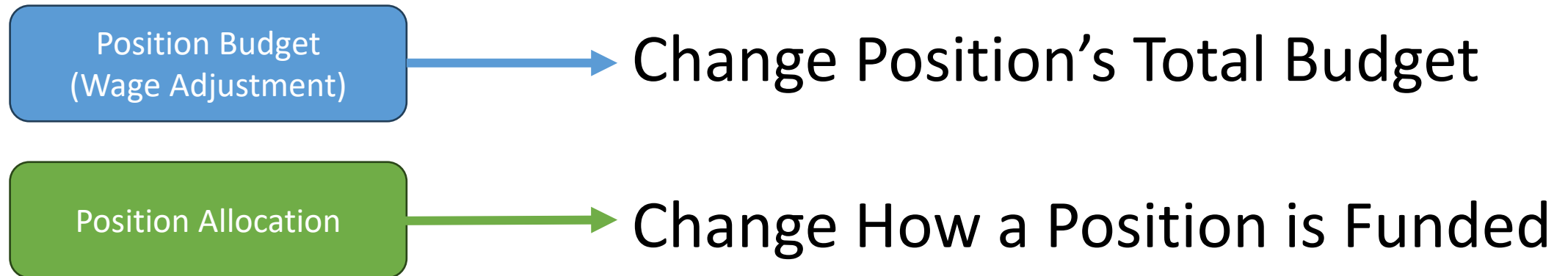
PBA Principle #3

Multiple Position Budget lines are required when a position is split-funded, but the lines must be identical.

<i>Position</i>		<i>Budget Adjustment ("Wage Adjustment")</i>	
<i>input</i>	<i>input</i>	<i>input</i>	<i>auto calc</i>
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$
00003300	95,000.00	95,000.00	-
00003300	95,000.00	95,000.00	-
00003311	80,000.00	80,000.00	-
00003311	80,000.00	80,000.00	-

PBA Principle #4

Use **Wage Adjustment** to make a change to the position budget. Use **Position Allocation** to define how a position should be funded. It may be necessary to do both.



PBA Principle #5

Validate the Position Budget and Position Allocation Change. Make adjustments if the results are not what you expect.

Position Budget Change
(Wage Adjustment)

Position Budget Adjustment ("Wage Adjustment")			
input	input	input	auto calc
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$
00001111	70,000.00	80,000.00	10,000.00
00002222	100,000.00	90,000.00	(10,000.00)

Position Allocation
Change

CFS Distribution Change ("Position Allocation")									
input	input	input	input	input	input	input	input	input	auto calc
Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %
601300	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	100.000000%	0.000000%
601200	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	100.000000%	0.000000%

Tools

Questica Position Budget Tableau Dashboard

Questica Position Budget Tableau Dashboard

- **Must request Access**
 - Requires Manager and Division Budget Officer Approval
 - Who should have access:
 - Positions/Personnel who are involved with position budgets, recruitments, personnel actions, etc.

The screenshot shows the 'Questica Position Budget Dashboards' access request form. At the top, there is a navigation bar with the CalPoly Pomona logo, links for IT&IP and Help, and user options like Get Help, My Tickets, Ask Billy, Logout, and Cart. Below the navigation bar is a search bar. The main content area is titled 'Questica Position Budget Dashboards' and 'Questica access'. It contains a message: 'To help us complete the setup that is needed for the Questica Position Budget Dashboard, please confirm your name is correct and press the submit button. You will receive an e-mail notification from itservicedesk@cpp.edu when we receive your request. Please allow five business days to complete your request.' The form has four required fields: '* Request access for' (a dropdown menu showing 'Anne-Marie Larrabure (alarrabure)'), '* Business justification' (a text area), '* Manager approver' (a dropdown menu), and '* Division approver' (a dropdown menu showing '-- None --'). To the right of the form is a 'Submit' button and a list of required information: 'Business justification', 'Manager approver', and 'Division approver'.

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Questica Position Budget Dashboards

Questica access

To help us complete the setup that is needed for the Questica Position Budget Dashboard, please confirm your name is correct and press the submit button. You will receive an e-mail notification from itservicedesk@cpp.edu when we receive your request. Please allow five business days to complete your request.

* Request access for

Anne-Marie Larrabure (alarrabure)

* Business justification

* Manager approver

* Division approver

-- None --

Submit

Required information

- Business justification
- Manager approver
- Division approver

Questica Position Budget Tableau Dashboard Cont.

- Questica Position Budget Dashboard
 - Use information from the dashboard to prepare a Position Budget Adjustment

Questica Position Budget		Glossary																	
Questica Position Budget																			
Fiscal Year	Home Division	HR DeptID	Charge Division	Charge College/Area	PSN No.	Position Status	Bargaining Unit	Job Code - Grade	Employee / Bronco ID										
2023 - 2024	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)										
Budget Scenario	Designation	Sub- Designation	Account Code	Fund Code	CFS Dept ID	Pgm Code	Class Code												
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)												
Summary																			
click to filter																			
Charge Division	Charge College/Area	CFS Dept ID	Budget Scenario	Effective FTE	Annual Budget by CFS														
20000 - VP Academic Affairs Office	16900 - Academic Programs	16900 - Academic Programs	ORIGINAL	11.46	1,047,413.89														
			Total	11.46	1,047,413.89														
		16970 - Graduate Studies	ORIGINAL	1.73	120,551.89														
			Total	1.73	120,551.89														
	20001 - VP Academic Affs Instructional	ADJUSTMENT	7.78	597,728.34															
			ORIGINAL	96.73	3,806,113.68														
		Total	104.51	4,403,842.02															
			117.70	5,571,807.80															
	16910 - Student Success	16910 - Student Success	ADJUSTMENT	5.95	276,535.71														
			ORIGINAL	4.05	504,238.29														
Detail																			
click to filter																			
Charge Division	Charge College/Area	PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario	Designation	Sub- Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS	
20000 - VP Academic Affairs Office	16900 - Academic Programs	00000062	Permanent	R09	1038 - 1	Admin Analys..		1.00	ORIGINAL	FEE	FEE_IL_SSF	601300	POM01	16900 - Ac..	0406	C3508	100.00	61,968.00	
		00000068	Permanent	R09	1038 - 1	Assistant to A..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	16900 - Ac..	0406	00000	100.00	65,664.00	
		00000069	Permanent	R09	1038 - 2	Senior Curric..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	16900 - Ac..	0406	00000	100.00	83,076.00	
		00000075	Permanent	M80	3300 - 1	Associate Vic..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601201	POM01	16900 - Ac..	0406	00000	100.00	206,352.00	
		00000093	Permanent	R09	5787 - 1	Coordinator, ..		1.00	ORIGINAL	FEE	FEE_IL_SSF	601300	POM01	16900 - Ac..	0406	C3508	100.00	118,844.00	
		00001730	Temporary	R03	2457 - 1	*SMR Sessio..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601801	POM01	16900 - Ac..	0406	00000	100.00	68,004.00	
		00001879	Permanent	R09	1038 - 1	Admin Analys..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	16900 - Ac..	0406	00000	100.00	62,016.00	

Questica Position Budget Tableau Dashboard Cont.

- **Questica Position Budget Dashboard Glossary**

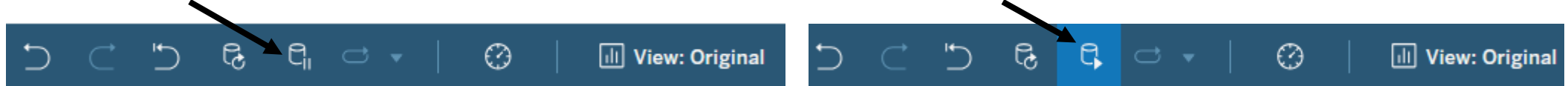
The Questica Position Budget Dashboard provides a position's budget by the Budget Scenario and CFS as established by each Division.

Budget Scenario	Identifies if the funding is ORIGINAL or ADJUSTMENT.
Charge Division	The Division that is incurring the expense.
CFS DeptID	The DeptID that is incurring the expense.
CFS Distr	Percentage of the CFS that the position is charged against.
Designation	Identifies if the funding is Undesignated, Designated, or Fee.
Effective FTE	The FTE by CFS specifics: Budget Scenario and CFS.
Home Division	The Division where the position lives.
HR DeptID	The Department where the position lives.
Job Code – Grade	Identifies the Classification's Job Code and Grade.
Position Status	Identifies if the position is Permanent or Temporary.
Sub-Designation	Identifies the specific type of funding designation.

Questica Position Budget Tableau Dashboard Cont.

- **Filters**

- Select Pause, Make your Selections, and Select Resume



Questica Position Budget

Fiscal Year	Home Division	HR DeptID	Charge Division	Charge College/Area	PSN No.	Position Status	Bargaining Unit	Job Code - Grade	Employee / Bronco ID
2023 - 2024	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)
Budget Scenario	Designation	Sub- Designation	Account Code	Fund Code	CFS Dept ID	Pgm Code	Class Code		
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)		

Questica Position Budget Tableau Dashboard Cont.

- **Summary**

- Provides high-level totals for FTE & Annual Budgets by DeptID & Budget Scenario

Summary click to filter					
Charge Division	Charge College/Area	CFS Dept ID	Budget Scenario	Effective FTE	Annual Budget by CFS
20000 - VP Academic Affairs Office	16900 - Academic Programs	16900 - Academic Programs	ORIGINAL	11.46	1,047,413.89
			Total	11.46	1,047,413.89
		16970 - Graduate Studies	ORIGINAL	1.73	120,551.89
			Total	1.73	120,551.89
	20001 - VP Academic Affs Instructional		ADJUSTMENT	7.78	597,728.34
			ORIGINAL	96.73	3,806,113.68
		Total		104.51	4,403,842.02
	Total			117.70	5,571,807.80

Questica Position Budget Tableau Dashboard Cont.

- **Detail**

- Provides details concerning a position's budget

Detail																		
click to filter																		
Charge Division	Charge College/Area	PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS
20000 - VP Academic Affairs Office	16900 - Academic Programs	00000062	Permanent	R09	1038 - 1	Admin Analys..		1.00	ORIGINAL	FEE	FEE_IL_SSF	601300	POM01	16900 - Ac..	0406	C3508	100.00	
		00000068	Permanent	R09	1038 - 1	Assistant to A..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	16900 - Ac..	0406	00000	100.00	
		00000069	Permanent	R09	1038 - 2	Senior Curric..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	16900 - Ac..	0406	00000	100.00	
		00000075	Permanent	M80	3300 - 1	Associate Vic..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601201	POM01	16900 - Ac..	0406	00000	100.00	
		00000093	Permanent	R09	5787 - 1	Coordinator, ..		1.00	ORIGINAL	FEE	FEE_IL_SSF	601300	POM01	16900 - Ac..	0406	C3508	100.00	
		00001730	Temporary	R03	2457 - 1	*SMR Sessio..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601801	POM01	16900 - Ac..	0406	00000	100.00	
		00001879	Permanent	R09	1038 - 1	Admin Analys..		1.00	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	16900 - Ac..	0406	00000	100.00	

Questica Position Budget Tableau Dashboard Cont.

- Filter Position to be Adjusted

Questica Position Budget

Fiscal Year

2024 - 2025

Home Division

(All)

HR DeptID

34741 - Enterprise Apps

Charge Division

34000 - ITIP VP/CIO

Charge College/Area

34700 - Information Tec...

PSN No.

00001129

Position Status

Permanent

Bargaining Unit

R09 - Cal St Univ EE U...

Job Code - Grade

0400 - 3

Employee / Bronco ID

(All)

Budget Scenario

(All)

Designation

(All)

Sub- Designation

(All)

Account Code

601300 - Support Staff S...

Fund Code

(All)

CFS Dept ID

(All)

Pgm Code

0607 - Administrative Inf...

Class Code

(All)

Summary

click to filter

Charge Division	Charge College/Area	CFS Dept ID	Budget Scenario	Effective FTE	Annual Budget by CFS
34000 - ITIP VP/CIO	34700 - Information Technology	34741 - Enterprise Apps	ORIGINAL	1.00	114,684.00
			Total	1.00	114,684.00
		Total		1.00	114,684.00
	Total			1.00	114,684.00
Grand Total				1.00	114,684.00

Detail

click to filter

Charge Division	Charge College/Area	PSN No.	Position Status	BU	Job Code - Grade	Title	Employee / Bronco ID	Effective FTE	Budget Scenario	Designation	Sub-Designation	Account Code	Fund Code	CFS Dept ID	Pgm	Class	CFS Distr	Annual Budget by CFS
34000 - ITIP VP/CIO	34700 - Information Technology	00001129	Permanent	R09	0400 - 3	Info Tech Consult-12 Mo-Expert		0.21	ORIGINAL	DESIGNATED	DSG_GI2025	601300	POM01	34741 - En..	0607	C3360	20.65	23,679.00
								0.79	ORIGINAL	UNDESIGNA..	UNDESIGNA..	601300	POM01	34741 - En..	0607	00000	79.35	91,005.00

Tools

Position Budget Adjustment Form

Position Budget Adjustment Form

- [Position Budget Adjustment Form](#) via BPA's Website
- **Submitter's Information**
 - Should be the department responsible for the budgets of the positions and/or the department who is allocating funds to a position in another department.

Position Budget Adjustment Change Request				
10/16/2024				
	Date*:			
	Division*:			
Submitter's DeptID & Name*:				
Journal Line (Title)*:		PBA-		
Brief Description:				
Requested by*:				
	Approved by:			
		(the authorized signer of the dept. "losing" budget or VP's Office designee)		

Position Budget Adjustment Form Cont.

- **Checks and Balances**
 - Should Net to Zero
 - Fund Check
 - Scenario Check
 - Designation Check
 - Please reach out to your BP&A Analyst PoC, if it does not Net to Zero

Budget Scenario & Designation Checks			
ORIGINAL	-	UNDESIGNATED	-
ADJUSTMENT	-	DESIGNATED	-
		FEES	-

Fund Check	
POM01	-
PCR01	-
PCR02	-
PCR04	-
PCR07	-
TM001	-
TV002	-
TW001	-
TX130	-
TX140	-
TY006	-
TZ001	-
	-

Position Budget Adjustment Form Cont.

- **Three Header Sections**

- Two Types of Columns

- Input = column requiring data to be entered
 - Auto Calc = calculates values based upon the data entered into the “Input” columns
 - Do not enter values in these columns (light grey cells)

- **Position Budget (“Wage”) Adjustment Section**

- Identifies the position’s number and budget

<i>Position Budget Adjustment ("Wage Adjustment")</i>			
<i>input</i>	<i>input</i>	<i>input</i>	<i>auto calc</i>
Position Number ▼	Current Total Pos Budget \$ ▼	New Total Pos Budget \$ ▼	Total Pos Budget Change \$ ▼

Position Budget Adjustment Form Cont.

- **CFS Distribution (“Position Allocation”) Section**
 - Identifies the Position’s CFS, Budget Scenario, and the Allocation %

CFS Distribution Change ("Position Allocation")										
input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc
Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)
▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼

Position Budget Adjustment Form Cont.

- **Budget Journal Output (“Change Request Budget Lines”) Section**

- Identifies the amount of the transfer based upon the data entered in the two previous sections.
 - Should net to zero



<i>Budget Journal Output (“Change Request Budget Lines”)</i>		
<i>auto calc</i>	<i>input*</i>	<i>input</i>
Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)

- “Document Line Number Description” Naming Convention
 - PBA-Accounting Period-Type of Adjustment-PSNS
 - PBA-01-PERM #1234 to #9876
 - PBA-04-TEMP #4567 to #7654
 - PBA-03-TEMP #4685 to Various

Position Budget Adjustment Form Cont.

- Position Allocation (CFS Distribution) Calculator

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$0.00		\$0.00	\$0.00	
CFS1	-			\$ -	
CFS2	-			\$ -	
CFS3	-			\$ -	
Totals	\$0.00	0.000%	\$0.00	\$0.00	0.000%
Enter applicable values in blue cells					

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$95,000.00		\$0.00	\$95,000.00	
CFS1	71,250.00	75.000%	\$ (23,750.00)	\$ 47,500.00	50.000%
CFS2	23,750.00	25.000%	\$ 23,750.00	\$ 47,500.00	50.000%
CFS3	-		\$ -	\$ -	0.000%
Totals	\$95,000.00	100.000%	\$0.00	\$95,000.00	100.000%
Enter applicable values in blue cells					

Four Examples

Two Methods for Permanent Transfers

Example #1: Wage Adjustment

Example #2: Position Allocation

Example #1

I need to permanently transfer a portion (\$10K) of a position's budget to another position without changing the CFS distribution.

Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")										Budget Journal Output ("Change Request Budget Lines")			
input	input	input	auto calc	input	input	input	input	input	input	input	input	input	auto calc	auto calc	auto calc	input	input
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)
00001111	70,000.00	80,000.00	10,000.00	601300	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	100.000000%	0.00000%	0.00000	10,000.00	PBA-04-PERM #1111 to #2222	adjusted due to new recruitment
00002222	100,000.00	90,000.00	(10,000.00)	601200	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	100.000000%	0.00000%	0.00000	(10,000.00)	PBA-04-PERM #1111 to #2222	move savings to #1111

A permanent change requires a Budget (Wage) Adjustment.

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$70,000.00		\$10,000.00	\$80,000.00	
CFS1	70,000.00	100.000%	\$ 10,000.00	\$ 80,000.00	100.000%
CFS2	-	0.000%	\$ -	\$ -	0.000%
CFS3	-		\$ -	\$ -	0.000%
Totals	\$70,000.00	100.000%	\$10,000.00	\$80,000.00	100.000%
Enter applicable values in blue					
Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$100,000.00		-\$10,000.00	\$90,000.00	
CFS1	100,000.00	100.000%	\$ (10,000.00)	\$ 90,000.00	100.000%
CFS2	-	0.000%	\$ -	\$ -	0.000%
CFS3	-		\$ -	\$ -	0.000%
Totals	\$100,000.00	100.000%	-\$10,000.00	\$90,000.00	100.000%
Enter applicable values in blue					

Both positions are single-funded, and the 'from' and the 'to' are the same scenario. The Position Allocation for both remains the same.

Example #2

I need to permanently change how positions are funded, but the position budgets remain the same.

Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")								Budget Journal Output ("Change Request Budget Lines")					
input	input	input	auto calc	input	input	input	input	input	input	input	input	input	auto calc	auto calc	auto calc	input	input
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)
00003300	95,000.00	95,000.00	-	601201	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	75.000000%	50.000000%	-25.000000%	-25.000000	(23,750.00)	PBA-04-PERM #3300 to #3311	xfer perm POM01 from 3300 to 3311
00003300	95,000.00	95,000.00	-	601201	POM01	12345	0602	00000	ADJUSTMENT	UNDESIGNATED	25.000000%	50.000000%	25.000000%	25.000000	23,750.00	PBA-04-PERM #3300 to #3311	xfer adj from 3311 to 3300
00003311	80,000.00	80,000.00	-	601300	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	129.687500%	29.687500%	29.687500	23,750.00	PBA-04-PERM #3300 to #3311	xfer perm POM01 from 3300 to 3311
00003311	80,000.00	80,000.00	-	601300	POM01	12345	0602	00000	ADJUSTMENT	UNDESIGNATED	0.000000%	-29.687500%	-29.687500%	-29.687500	(23,750.00)	PBA-04-PERM #3300 to #3311	xfer adj from 3311 to 3300

Current and new position budget should remain the same.

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$95,000.00		\$0.00	\$95,000.00	
CFS1	71,250.00	75.000%	\$ (23,750.00)	\$ 47,500.00	50.000%
CFS2	23,750.00	25.000%	\$ 23,750.00	\$ 47,500.00	50.000%
CFS3	-		\$ -	\$ -	0.000%
Totals	\$95,000.00	100.000%	\$0.00	\$95,000.00	100.000%
Enter applicable values in blue					

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$80,000.00		\$0.00	\$80,000.00	
CFS1	80,000.00	100.000%	\$ 23,750.00	\$ 103,750.00	129.688%
CFS2	-	0.000%	\$ (23,750.00)	\$ (23,750.00)	-29.688%
CFS3	-		\$ -	\$ -	0.000%
Totals	\$80,000.00	100.000%	\$0.00	\$80,000.00	100.000%
Enter applicable values in blue					

Adjust the CFS distribution (Position Allocation) for both positions.

Two Methods for Temporary Transfers

Example #3: Partial vs.

Example #4: Whole Position Funding

Example #3

I need to make a temporary transfer to fund a position with one-time salary saving, moving partial funding (\$70,236) from one position to another.

Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")											Budget Journal Output ("Change Request Budget Lines")			
input	input	input	auto calc	input	input	input	input	input	input	input	input	input	input	auto calc	auto calc	auto calc	input	input
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)	
00004444	99,996.00	170,232.00	70,236.00	601201	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	58.741010%	-41.25899%	-41.25899	-	PBA-04-TEMP #5555 to #4444	xfer funds due to position upgrade	
00004444	99,996.00	170,232.00	70,236.00	601201	POM01	12345	0602	00000	ADJUSTMENT	UNDESIGNATED	0.000000%	41.258990%	41.25899%	41.25899	70,236.00	PBA-04-TEMP #5555 to #4444	xfer funds due to position upgrade	
00005555	127,296.00	57,060.00	(70,236.00)	601201	POM01	12345	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	223.091483%	123.09148%	123.09148	-	PBA-04-TEMP #5555 to #4444	xfer funds due to position upgrade	
00005555	127,296.00	57,060.00	(70,236.00)	601201	POM01	12345	0602	00000	ADJUSTMENT	UNDESIGNATED	0.000000%	-123.091483%	-123.09148%	-123.09148	(70,236.00)	PBA-04-TEMP #5555 to #4444	xfer funds due to position upgrade	

Adjust the position budget. Put current and the new budget desired.

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$99,996.00		\$70,236.00	\$170,232.00	
CFS1	99,996.00	100.000%	\$	99,996.00	58.741%
CFS2	-	0.000%	\$ 70,236.00	\$ 70,236.00	41.259%
CFS3	-		\$	-	0.000%
Totals	\$99,996.00	100.000%	\$70,236.00	\$170,232.00	100.000%
Enter applicable values in blue					

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$127,296.00		-\$70,236.00	\$57,060.00	
CFS1	127,296.00	100.000%	\$	127,296.00	223.091%
CFS2	-	0.000%	\$ (70,236.00)	\$ (70,236.00)	-123.091%
CFS3	-		\$	-	0.000%
Totals	\$127,296.00	100.000%	-\$70,236.00	\$57,060.00	100.000%
Enter applicable values in blue					

Add an Adjustment CFS Distribution.

Due to the temporary nature, the funding mix changes for both positions.

Use the Position Allocation Calculator to **compute the New Position Allocation** percentages.

Example #4

I have a vacant, base-funded position, and I need to transfer the whole position budget (\$60K) on a one-time basis to another position.

Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")												Budget Journal Output ("Change Request Budget Lines")		
input	input	input	auto calc	input	input	input	input	input	input	input	input	input	input	auto calc	auto calc	auto calc	input	input
Position Number	Current Total Pos Budget \$	New Total Pos Budget \$	Total Pos Budget Change \$	Account	Fund	DeptId	Pgm	Class	Budget Scenario	Designation	Current Pos Allocation %	New Pos Allocation %	Position Alloc Change %	Position Alloc Change (number format)	Total Transfer	Document Line Number Description (Transfer To / From) LIMITED TO 30 CHARACTERS	Reason Journal Description (purpose for the adjustment)	
00005678	-	60,000.00	60,000.00	601300	POM01	12345	0602	00000	ADJUSTMENT	UNDESIGNATED	0.000000%	100.000000%	100.000000%	100.000000	60,000.00	PBA-04-TEMP #5678 to #1234	xfer funds due to temp appointment	
00001234	60,000.00	60,000.00	-	601300	POM01	34567	0602	00000	ORIGINAL	UNDESIGNATED	100.000000%	100.000000%	0.000000%	0.000000	-	PBA-04-TEMP #5678 to #1234	xfer funds due to temp appointment	
00001234	60,000.00	60,000.00	-	601300	POM01	34567	0602	00000	ADJUSTMENT	UNDESIGNATED	0.000000%	-100.000000%	-100.000000%	-100.000000	(60,000.00)	PBA-04-TEMP #5678 to #1234	xfer funds due to temp appointment	

"Transfer from" position remains the same.
 "Transfer to" position shows the transfer amount as the new position budget.

Position Allocation (CFS Distribution) Calculator					
	Current	Current %	PBA	New	New %
	\$60,000.00		-\$60,000.00	\$0.00	
CFS1	60,000.00	100.000%		\$ 60,000.00	
CFS2	-	0.000%	\$ (60,000.00)	\$ (60,000.00)	
CFS3	-			\$ -	0.000%
Totals	\$60,000.00	100.000%	-\$60,000.00	\$0.00	0.000%
Enter applicable values in blue					

Since the entire budget will be transferred, you cannot calculate the new position allocation percentages. **Instead, zero out the source position allocation to force the funding to go to zero.**

Add an Adjustment CFS for the "Transfer from" position with -100% to zero out the position allocation.

Add an Adjustment CFS for "Transfer to" position with +100%.

Live Demo



Questions?

Please email us at budget@cpp.edu