

Questica Position Budget Adjustment (PBA)

Summary guide of how to submit an Position Budget Adjustment (PBA) through Questica.

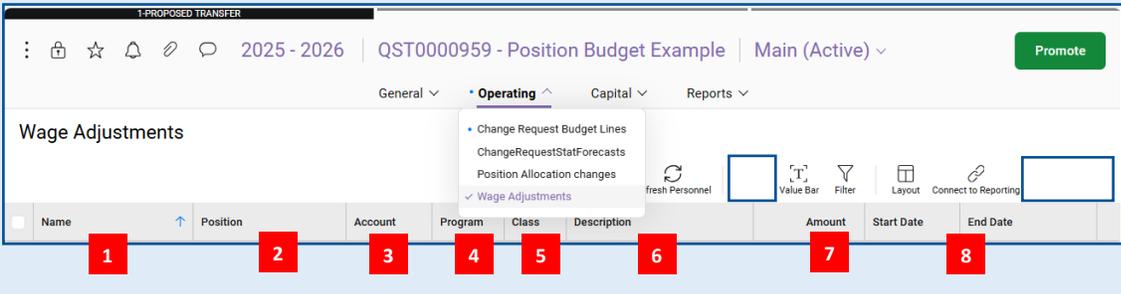
Please visit [Budget Planning & Analysis website](#) for additional training materials and forms.

Links: [Tableau](#) [Questica Production](#) [Position Budget Adjustment Template \(XLSX\)](#)

[Request Tableau Access](#) [Request Questica Access](#) [Inactive Dept IDs](#) [Salary & Wage Acct Codes](#)

	Navigation	Instructions
1. Prepare Backup Documentation	PBA Excel Template Tableau – Questica Position Budget Current Fiscal Year / Position #(s) Tableau— Custom View (OE) funding Fund / Dept ID / Program / Class / Account	PBA Excel Template: Backup documentation of wage adjustments and/or position allocation changes. Tableau Questica Position Budget: show sufficient funds in positions. Tableau Custom View: show sufficient funds in OE account.
2. Create New Transfer Record in Questica	Budgeting > Change Requests > Change Requests Change Request Home Page > 	Department: Requestor’s Home Dept ID Fund: Fund used in Transfer Change Request Type: Position Budget Adjustment Journal Line Ref: Auto populated Journal Line (Title): PBA - Period - Division - Descr Brief Description: PERM or TEMP (action) PERM - ongoing action TEMP - one-time action Include Position Information Example: “PERM OE to #1111”
3. Save Transfer Backup Documentation in Change Request	Top Left > Paperclip Icon   OR Drag and Drop	Required: PBA Excel Template Save prepared backup documentation from Tableau Questica Position Budget, Custom View, or other documents (e.g. emails, forms, etc.).

4. Enter Transfer into Questica Wage Adjustments



Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")								Budget Journal Output ("Change R")				
input*	input*	input*	auto calc	input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	auto calc	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
2			7	3			4	5								6

- 1** - Name: “PBA - Description”; “PBA” is required at the to identify the change request transaction.
- 7** - Amount: When using the export/import function, negative amounts must be formatted with a dash, not parenthesis.
- 8** - Start Date: July of the current fiscal year (July 2025)
- 8** - End Date: Determined based upon the action of the transaction. If PERM/ongoing, leave blank. The change will carry over in the next fiscal year. If TEMP/one-time, enter in an end date (June of FY) and the transaction will not carry over into the next fiscal year.

5. Enter Transfer in Questica
Position Allocation Change
 (Not required if there are zero Position Allocation Changes - Column P)

Navigation

2025 - 2026 | QST0000959 - Position Budget Example | Main (Active) >

General > **Operating** > Capital > Reports >

Position Allocation changes

Basic >

Refresh Personnel | Add | Value Bar | Filter | Layout | Connect to Reporting | Import | Export

Instructions

Change Request Budget Lines
 Change Request Stat Forecasts
 Position Allocation changes
 Wage Adjustments

Position	Fund-Department	Program	Class	Budget Scenario	Amount	Position Allocation Type	Document Line Number	Description	Ledger Group	Start Date	End Date
1	2	3	4	5	6	7	8	9	10		

Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")								Budget Journal Output ("Change Request")				
input*	input*	input*	auto calc	input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	auto calc	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
1				2	3	4	5				6					8

6 - Amount: When using the export/import function, negative amounts must be formatted with a dash, not parenthesis.

7 - Position Allocation Type: Percentage

9 - Ledger Group: STD_BUDGET

10 - Start Date: July of the current fiscal year (July 2025)

- End Date: Determined based upon the action of the transaction. If PERM/ongoing, leave blank. The change will carry over in the next fiscal year. If TEMP/one-time, enter an end date (June of FY) and the transaction will not carry over into the next fiscal year.

6. Enter Transfer in Questica OE

Operating > Change Request Budget Lines

Follow [Operating Expense Change Request Instructions](#)

7. Verify Questica Change Request Budget Lines with PBA Excel Form
 (Ensure dollar amounts in Questica match Excel by CFS & Scenario)

Operating Budget

Position	Account	Fund-Department	Program	Class	Project	Document Line Description	Budget S...	Ledger Group	2025
AY Temp Faculty No Ent (00001787)	601804 - Part Time Faculty	POCMP - POM01 - 36000 -	0101 - Gene...	00000 - NO CLASS VALUE	TEMP OE to #1787	ORIGINAL - ...	STD_BUDGET - ST...		(0.00)
AY Temp Faculty No Ent (00001787)	601804 - Part Time Faculty	POCMP - POM01 - 36000 -	0101 - Gene...	00000 - NO CLASS VALUE	TEMP OE to #1787	ADJUSTME...	STD_BUDGET - ST...		1,000.00
660003 - Supplies and Services	POCMP - POM01 - 36000 -	0101 - Gene...	00000 - NO CLASS VALUE	TEMP OE to #1787	ADJUSTME...	STD_BUDGET - ST...			(1,000.00)

2025 - 2026 | QST0000998 - TEST PBA | Main (Active) >

General > Operating > Capital > Reports >

Operating Budget

Position Budget Adjustment ("Wage Adjustment")				CFS Distribution Change ("Position Allocation")								Budget Journal Output ("Change Request")				
input*	input*	input*	auto calc	input*	input*	input*	input*	input*	input*	input*	input*	input*	auto calc	auto calc	auto calc	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
00001787	29,856.00	30,856.00	1,000.00	601804	POM01	36000	0101	00000	ORIGINAL	UNDESIGNATED	75.000000%	72.56935%	-2.43065%	-2.43065		TEMP OE to #1787
00001787	29,856.00	30,856.00	1,000.00	601804	POM01	36000	0101	00000	ADJUSTMENT	UNDESIGNATED	25.000000%	27.43065%	2.43065%	2.43065	1,000.00	TEMP OE to #1787
OE600003	75,871.00	74,871.00	(1,000.00)	660003	POM01	36000	0101	00000	ADJUSTMENT	UNDESIGNATED	100.000000%	100.000000%	0.000000%	0.00000	(1,000.00)	TEMP OE to #1787

8. Make Change Request a Favorite & Promote Transfer

2025 - 2026

Promote

Select Star Icon to file as Favorite.

Select Promote Button > Option 2 > Next > Save

Requirements

- "Brief Description" Summarizes Transfer Action with Position Numbers, "PERM", "TEMP", "OE"
- Journal Line Title (Naming Convention): PBA - Accounting Period - Division - Description of Transfer
- Upload PBA Excel Template and Tableau back-up documentation in Change Request
- Transfer nets to Zero: By Fund; By Scenario; By Designation
 Cross transfers are NOT allowed
- Use appropriate chartfield values:
 - No transfers between Revenue Accounts
 - Positions: Salary Accounts Only
 - OE Lines: Salary Accounts are Prohibited

[List of Salary & Wage Account Codes](#)

- Do not use Inactive Department IDs & Account Codes

[List of Inactive Dept IDs](#)

[List of Inactive Account Codes](#)