

# 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 \(XLSX\)](#)

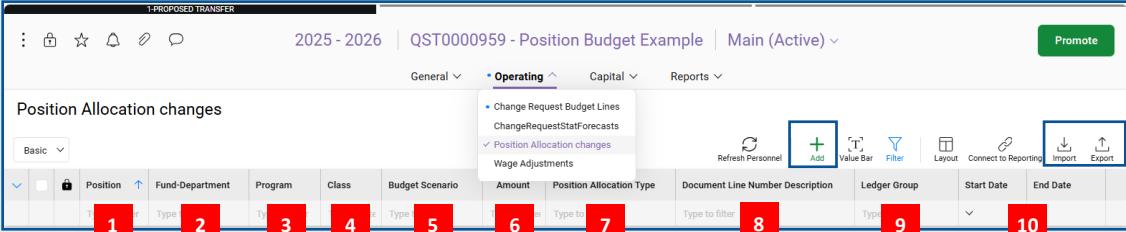
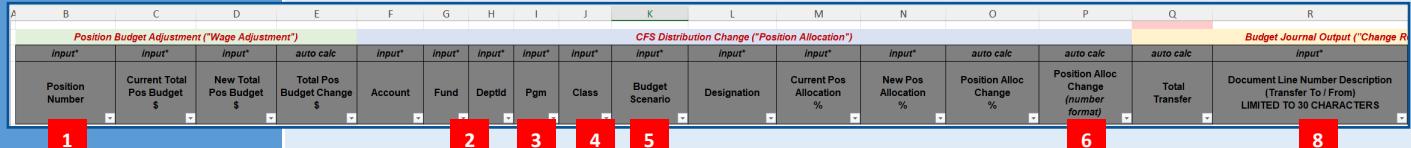
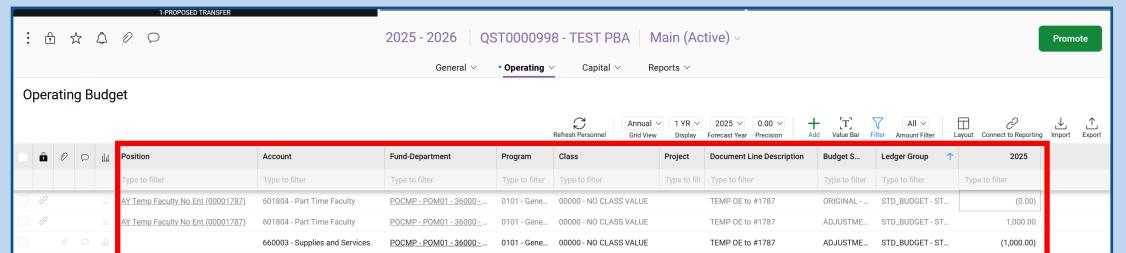
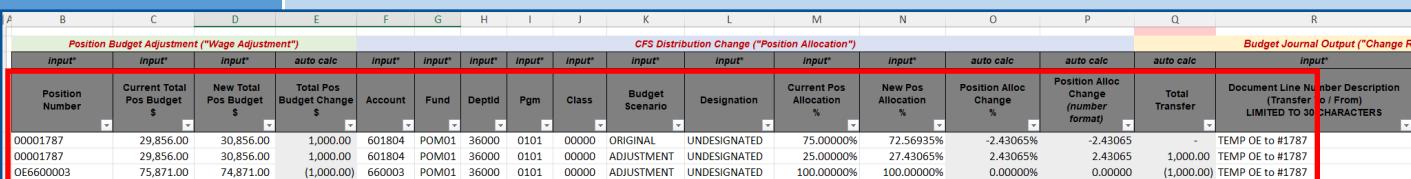
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		Navigation	Instructions
1. Prepare Backup Documentation	PBA Excel Template Tableau – Questica Position Budget Current Fiscal Year / Position #(s) Tableau— Custom View (OE) funding Fund / Dept ID / Program / Class / Account		PBA Excel Template: Backup 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	<p>1 - Name: "PBA - Description"; "PBA" is required at the to identify the change request transaction. 2 - Amount: When using the export/import function, negative amounts must be formatted with a dash, not parenthesis. 3 - Start Date: July of the current fiscal year (July 2025) 4 - 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.</p>		

		Navigation										Instructions				
<b>5. Enter Transfer in Questica</b> <b>Position Allocation Change</b> <b>(Not required if there are zero Position Allocation Changes - Column P)</b>																
												<p>1 - Amount: When using the export/import function, negative amounts must be formatted with a dash, not parenthesis.</p> <p>2 - Position Allocation Type: Percentage</p> <p>3 - Ledger Group: STD_BUDGET</p> <p>4 - Start Date: July of the current fiscal year (July 2025)</p> <p>5 - 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.</p>				
<b>6. Enter Transfer in Questica OE</b>		Operating > Change Request Budget Lines										Follow <a href="#">Operating Expense Change Request Instructions</a>				
<b>7. Verify Questica Change Request Budget Lines with PBA Excel Form</b> <b>(Ensure dollar amounts in Questica match Excel by CFS &amp; Scenario)</b>																
<b>8. Make Change Request a Favorite &amp; Promote Transfer</b>												<p>Select Star Icon to file as Favorite.</p> <p>Select Promote Button &gt; Option 2 &gt; Next &gt; Save</p>				
<b>Requirements</b>																
<ul style="list-style-type: none"> <li>“Brief Description” Summarizes Transfer Action with Position Numbers, “PERM”, “TEMP”, “OE”</li> <li>Journal Line Title (Naming Convention): PBA - Accounting Period - Division - Description of Transfer</li> <li>Upload PBA Excel Template and Tableau back-up documentation in Change Request</li> <li>Transfer nets to Zero: By Fund; By Scenario; By Designation Cross transfers are NOT allowed</li> <li>Use appropriate chartfield values: <ul style="list-style-type: none"> <li>No transfers between Revenue Accounts</li> <li>Positions: Salary Accounts Only</li> <li>OE Lines: Salary Accounts are Prohibited <a href="#">List of Salary &amp; Wage Account Codes</a></li> </ul> </li> <li>Do not use Inactive Department IDs &amp; Account Codes <a href="#">List of Inactive Dept IDs</a> <a href="#">List of Inactive Account Codes</a></li> </ul>																