

Remember to use the Visual Assist  to search for information.

To	Do This
<p><b>Create Position Budgets</b></p>	<p><b>Navigation</b></p> <p>Human Resources and Payroll – Agencies &gt; Position Control &gt; Enter/Revise Position Budgets</p> <p><b>Steps</b></p> <p>From the Enter/Revise Position Budgets – Work With Positions window.</p> <ol style="list-style-type: none"> <li>1. Click <b>Add</b>. The Enter/Revise Position Budgets – Position Master Detail window appears.</li> <li>2. Complete the following fields: <ul style="list-style-type: none"> <li>• Home Business Unit</li> <li>• Fiscal Year - defaults in current year.</li> <li>• Position ID (first 3 digits are agency number, digits 4 through 8 are defined by agency - example 02901001)</li> <li>• Description (enter exact Job Code title)</li> <li>• Security Business Unit</li> <li> Leave Effective from and thru Dates blank. This is only used when ending positions.</li> <li>• Budget Status</li> <li>• Budget Status Date</li> <li>• Position Status</li> <li>• Position Status Date</li> <li>• Job Code</li> <li>• Position Budget Amount</li> <li>• Budgeted FTE – The number of full-time equivalents</li> <li>• Budgeted Hours – The number of hours that are budgeted for a position within a business unit for a period of one year.</li> <li>• Headcount – The number of employees requested, budgeted, or approved for a position or requisition.</li> <li>• Business Unit – Parent (if applicable)</li> <li>• Parent Position ID (contains PSL allocation) (if applicable)</li> <li> The position's budget must have an approved status before you can assign it to an employee.</li> <li> When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.</li> <li>• Division (if applicable)</li> <li>• Section (if applicable)</li> <li>• Unit (if applicable)</li> <li>• City/Facility</li> <li>• Funding (if applicable)</li> </ul> </li> </ol>

## Maintain Position Budgets

3. Click **OK**.
4. Click **Cancel**.
5. Click **Close**.

Start this instruction from the Enter/Revise Position Budgets – Work With Positions window.

1. Click **Find**.
2. Choose the record you wish to maintain/edit by placing a checkmark to the left of the grid row.
3. Click **Select**.
4. On Enter/Revise Position Budgets – Position Master Detail, complete the appropriate fields:
  - Fiscal Year (will default to current fiscal year)
  - Security Business Unit
  - Budget Status
    -  This could be a P or A status - depending on the agency's internal process. Status must be A to attach an employee to the position.
  - Budget Status Date
  - Position Status
    -  When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.
  - Position Status Date
  - Job Code
  - Budgeted Hours – The number of hours that are budgeted for a position within a business unit for a period of one year.
  - Headcount – The number of full-time equivalents
  - Business Unit – Parent (if applicable)
    -  Home business unit and parent business unit must be the same.
  - Parent Position ID (contains PSL allocation) (if applicable)
    -  The information for these tables can only be updated by DAS. Agencies will need to contact DAS first to update the tables prior to use.
      - Division - Program or facility
      - Section - Subprogram
      - Unit
      - City/Facility
      - Funding - Bill number passed by Legislature to fund the position
5. Click **OK** to accept the information and clear the table.
6. Click **Cancel** to return to the Work with Positions window.
7. Click **Close**.