Creating Position Budgets

Overview

Creating a Position Budget

The Agency Budget Contact defines position budgets to establish, monitor, and control budgets for employee assignments. For each position, the following types of components can be used to plan for and manage agencies:

- Salary expenditures
- Hours worked
- FTEs
- Headcount (number of employees)

When defining a position budget, the following steps are completed:

1. Identify the need for one or more employees.
2. Approve the need for the employees.

   The position's budget status must have an active status before you can assign it to an employee.

3. Set up a budget for the employee salary and hours worked.
4. Assign the appropriate FTEs and head count to the position. Monitor hiring to ensure that you do not exceed the position budget.

Entering G/L Account Information

Actual payroll data for an employee is not reflected in position activity. Currently, DAS - Budget Division does not enter G/L account information via NIS. Run the Agency Budget Staffing report to review actual expenditures to budgeted salary information for employees.

This work instruction shows how to:

Create a Position Budget

Maintain a Position Budget

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: http://www.das.state.ne.us/.

Navigation

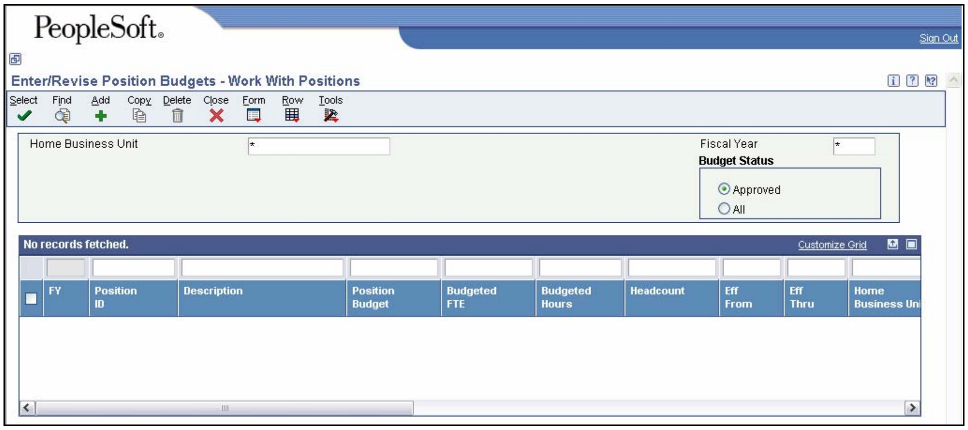
Click Roles, HR_PR .
(Citrix users – right click on the menu, choose Apply Roles, choose HR_PR.)

Human Resources and Payroll – Agencies > Position Control > Enter/Revise Position Budgets

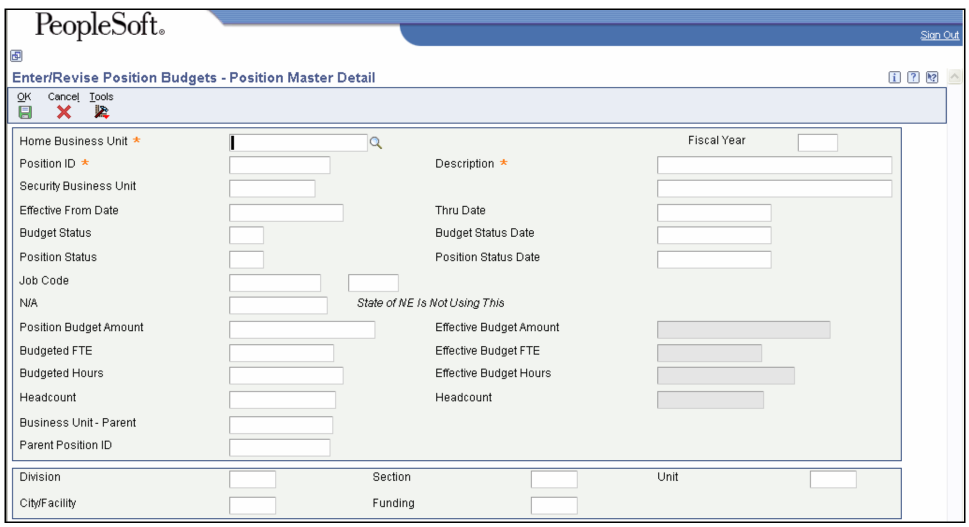
Steps

Create a Position Budget

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



1. Click **Add**.



2. On Enter/Revise Position Budgets – Position Master Detail, complete the following fields:
   - Home Business Unit

     Home business unit and parent business unit must be the same.
   - Fiscal Year (will default to current fiscal year)
   - Position ID (use agency number and position number, ex: 06510000)
   - Description (enter exact Job Code title)
   - 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
- Position Budget Amount
- Budgeted FTE – The number of employees requested, budgeted, or approved for a position or requisition.
- 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.

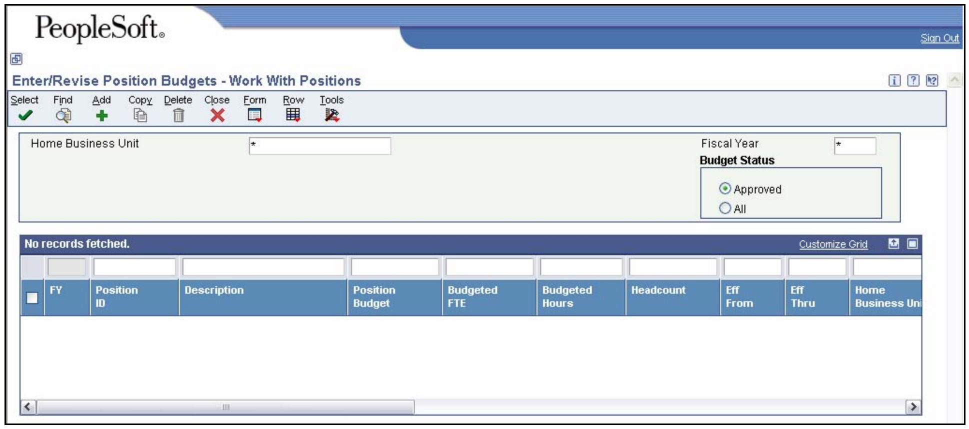
- Parent Position ID (contains PSL allocation) (if applicable)
- Division - Program or facility
- Section - Subprogram
- Unit
- City/Facility
- Funding - Bill number passed by Legislature to fund the position

  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.

3. Click **OK** to accept the information and clear the table.
4. Click **Cancel** to return to the Work With Positions window.
5. Click **Close**.

Maintain a Position Budget - Agency

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

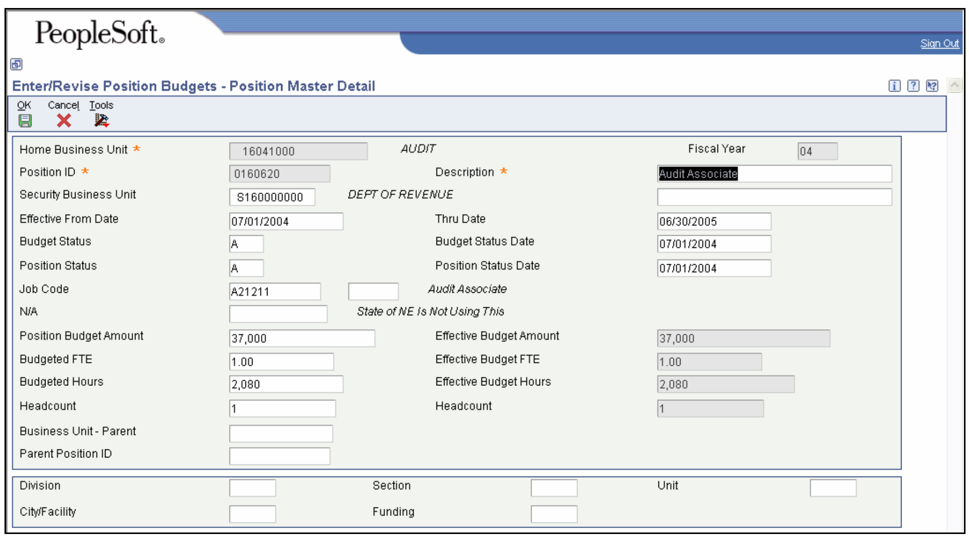


1. Click **Find**.

To narrow your search, enter any known information in the header or QBE line.

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**.