



# Budgeting Appointment Changes Effective with the New Fiscal/Academic Year

## Scope

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## Scope

All Indiana University units and full time benefit eligible employees.

## Business Practice Statement

Appointment changes such as transfers, promotions, or reclassifications effective for the new fiscal year beginning July 1 for staff and academic administrators, or August 1 for faculty following the academic calendar, will be reflected in the budget.

## Reason for Business Practice

To establish a uniform budgeting process for employees with appointment changes to be effective with the new fiscal/academic year. Appropriate budgeting will provide an accurate picture of appointment funding for the new fiscal/academic year. This will enhance transparency by minimizing budgeting of salary savings, which does not provide the ability to track by position.

## Procedure to Address

**New Fiscal Year Appointment** An appointment change such as a transfer, promotion, reclassification, or new hire effective July 1 for staff and academic administrators, or August 1 for faculty following the academic calendar, will be reflected in the budget. The new appointment will not flow into budget construction through the Calculated Salary Foundation (CSF) Tracker, and so will need to be manually reflected. An eDoc with the appropriate information and effective date must be processed and saved to PeopleSoft to enable budgeting in the Quali Financial System (KFS) Budget Construction module.

## Definition

**New Fiscal Year Appointment** An appointment change or new hire to be effective with the new fiscal year, neither of which is reflected in the CSF tracker.

## Appointment Change Examples

- Reclassification
- Transfer
- Promotion/demotion
- 10-month to 12-month/12-month to 10-month
- New hire

In Budget Construction, to budget a new hire beginning with the new fiscal year, the eDoc must be finalized with the effective date 7/1 for 12-month appointments, and 8/1 for 10-month appointments.

Quick Salary Setting ▼ hide

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**Expenditure Salary Line**

Chart	Account	SubAccount	Object	SubObject	SubFundGrpCd	Org
BL BLOOMINGTON	1046200 DEPT OF KINESIOLOGY	----	2000 ACADEMIC SALARY	---	GENERAL FUNDS	KINESIOLOGY

[add position](#)   [add incumbent](#)

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**Salary Line Detail** show % a

Del	Position	Name	Cs	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSF FTE	* Funding Month	* Requested Salary	Requested FTE	Change Percent	Actions
<input type="checkbox"/>	00029548	VACANT		AC1	FCX	10	10	45,000	1.00000	10	66,000	1.00000	46.67	<a href="#">posn salset</a> <a href="#">delete</a>
<input checked="" type="checkbox"/>	00029790	VACANT		AC1	FLX	10	10	60,000	1.00000	10	0	0.00000	(100.00)	<a href="#">posn salset</a>
<input checked="" type="checkbox"/>	00031442	VACANT		AC1	FVX	12	12	26,192	1.00000	12	0	0.00000	(100.00)	<a href="#">posn salset</a>

If the position was vacant and had CSF, click the **posn salset** button on the position you want to add the new employee to. You will move to the Salary Setting screen.

**Add Funding**

Del	* Chart	* Account	Sub Account	* Object	Sub Object	* Emplid	Cls	Post
<input type="checkbox"/>	BL BLOOMINGTON	1046200 DEPT OF KINESIOLOGY		2000				FC3

Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount
Request:	66000		10	100	1.00000		
Leave Request CSF: NONE No Leave							
<b>Total Intended:</b>	0				0		

**add**

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**BL, 1046200, -----, 2000, ---, VACANT, 00029548**

Del	* Chart	* Account	Sub Account	* Object	Sub Object	* Emplid	Cls	Post
<input type="checkbox"/>	BL BLOOMINGTON	1046200 DEPT OF KINESIOLOGY	-----	2000 ACAD SALARY	---	VACANT		

Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount
CSF: Adjust: % <input type="text"/> <b>apply</b>	45,000			100.00	1.00000		
Request:	66,000	0	10	100.00	1.00000		0
Leave Request CSF: NONE No Leave	0			0.00	0.00000		
<b>Total Intended:</b>	0				0.00000		

**delete**

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**Totals**

	Amount	Standard Hours	FTE
CSF:	45,000	40.00	1.00000
Request:	66,000	40.00	1.00000
Leaves Request CSF:	0	0.00	0.00000

Enter the account number, sub account and/or sub-object if needed, emplid, request amount, months, and percent time – clicking **add**. Click **delete** on the vacant line, click **save** and **close**. You will be returned to the Quick Salary Setting tab.

**Quick Salary Setting**

**Expenditure Salary Line**

Chart	Account	SubAccount	Object	SubObject	SubFundGrpCd
BL BLOOMINGTON	1046200 DEPT OF KINESIOLOGY	-----	2000 ACADEMIC SALARY	---	GENERAL FUNDS KINESIOLOG

**add position** **add incumbent**

**Salary Line Detail**

Del	Position	Name	Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSF FTE	* Funding Month	* Requested Salary	Requested FTE	Change Percent	Actions
<input type="checkbox"/>	00029548		PT	AC1	FCX	10	10			10	66,000	1.00000		<b>posn salset</b> <b>incmbnt sal</b>
<input checked="" type="checkbox"/>	00029548	VACANT		AC1	ECX	10	10	45,000	1.00000	10	0	0.00000	(100.00)	<b>posn salset</b>
<input checked="" type="checkbox"/>	00029790	VACANT		AC1	FLX	10	10	60,000	1.00000	10	0	0.00000	(100.00)	<b>posn salset</b>
<input checked="" type="checkbox"/>	00031442	VACANT		AC1	FVX	12	12	26,192	1.00000	12	0	0.00000	(100.00)	<b>posn salset</b>

You will now see the new incumbent listed with a requested salary and no CSF. You will also see the original position line with CSF marked for delete. You can now save and close back to the Budget Construction Document page.