Using the Position Budget Management Position Page

The Position Budget Page provides information on funding, budgets, encumbrance, and expense for a single position. The Position Budget page allows users to review budget, encumbrance, expense, and salary distribution data for a single position and to create budget journals to adjust ChartFields referenced on the page as seen below:

Section A – Position Reference Data:

- **Position Number**: Displays position number including the job code title associated with the row imported. Additionally, the system adds the Position Number to the “Ref” field on Budget Journals.
- **Budget Reference**: Displays current year in process and is used for the Budget Reference on created Budget Journals.
- **HR Department**: Displays the Department entered on the Add/Update Position page in OneUSG.
Section B – Budget Journal Header Fields:

- **Journal ID**: For the Position Budget Page, users can either enter a new Journal ID in this field or use the magnifying glass button to look up existing journals not yet posted. Once the user saves changes, the system overwrites the fourth character of the Journal ID with an “A” or “P” depending on if the page creates APPROP or PROJ_GRT ledger journals, respectively.
- **Date**: Defaults to the current date if a new Journal ID is entered or to the date from the Journal if an existing Journal ID is selected.
- **Fiscal Year**: Enter the fiscal year to match the Budget Reference.
- **Period**: Enter the same period to match the current open Accounting Period.

Section C – Incumbent Information and Summary Budget Data:

- **Empl ID**: Displays the Employee active in the position as of the most recent HCM Refresh.
- **Rcd#**: Displays the Record for the employee ID associated with the position. The Employee’s name is loaded next to this field.
- **Effective Date**: Displays the Effective Date of the Job row imported as of the most recent HCM Refresh.
- **Seq**: Displays the sequence number of the Job row imported as of the most recent HCM Refresh.
- **Original Budget**: Displays the sum of all posted Budget Journals of type “Original” in a salary account
- **Permanent Budget**: Displays the sum of the Original Budget and any Permanent Amendments in salary accounts
- **Distributed Amount**: Displays the Annual Rate from Job as of the most recent HCM Refresh.
- **Over/Under Budget**: Displays the total of Permanent Budget minus Distributed Amount
Section D – Position Budget ChartFields:

This section displays the ChartField information for the specified position. If the position is split or has an expense charged against a different ChartField, this position may have more than one entry. Review the top right of this section for the total number of entries or click the “View All” link to show all entries.

Section E – Account Distribution:

This section shows how the position funding is distributed among multiple accounts. The section displays four entries by default, but the ChartField may have more entries. Review the top right of this section for the total number of entries or click the “View All” link to show all entries.

- **Account**: Displays account to which an expense was charged. The Account Distribution section returns all ORG entries for accounts with an expense if the ledger option chosen at setup was “ORG Only with Gen Parent” or “APPROP and ORG.” All rows are summarized at the APPROP level if the ledger option chosen at setup was “APPROP Only.”
- **Distributed Salary**: Populates from Annual Rate on Job split based on the Department Budget Table entry current as of the most recent HCM Refresh. This field is only visible for salary rows and is not used as part of calculating remaining.
- **Original Budget**: Displays is the total of all posted Budget Journals of type “Original.”
- **Perm Amends**: Displays the total of all posted Budget Journals of type “Permanent Adjustment.”
- **Temp Amends**: Displays the total of all posted Budget Journals of type “Adjustment”
- **Pend Amends**: Displays the total of all budget journals not yet posted
- **Encumb**: Displays the encumbrance for the position from the table BUDGET_ACTUALS in OneUSG. BUDGET_ACTUALS is updated as part of the Encumbrance Calc Process.
- **Expense**: Displays the total of expenses for the position from the table PERS_SERV_BOR in Financials. Expenses will include payroll accruals.
- **Remaining**: Displays the total of Original Budget + Perm Amends + Temp Amends + Pend Amends – Encumb - Expense
- **Budget Adjust**: This is an input field for users to enter budget adjustments. When users click “Apply,” any rows that are not blank are used to create Budget Journal rows for the ChartField and position from the row.