

## Budget Template Instructions- FY 2018

Completed spreadsheet based on what is occurring with the position (PIN)

Field #	Field Description	Instructions
Field 1	<b>PIN</b>	Prepopulated / <b>DO NOT CHANGE</b> - Employees current PIN. * If an employee is changing PINS (transferring positions) leave the current PIN on your spreadsheet, and mark with the appropriate Occupant Action in Field 5. * Then add the employees new PIN at the bottom of your spreadsheet. * Note: If you do not have a PIN (for a new position) the payroll office will create the PIN for you if the employee is beginning on (and only on) 9/1.
Field 2	<b>Employee Name</b>	Prepopulated / <b>DO NOT CHANGE</b> - Employees name on the budget
Field 3	<b>Title Short Description</b>	Prepopulated / <b>DO NOT CHANGE</b> - Official BPP title
Field 4	<b>UIN</b>	Prepopulated / <b>DO NOT CHANGE</b> . If you are hiring a new employee and do not have a UIN, enter the employees social security number (SSN). For new employees, the UIN or SSN is required.
Field 5	<b>Occupant Action</b> <i>Options Available</i>	
	<i>IT Involuntary Terminate</i>	Employee terminating for cause, or an at will termination 8/31 or before. Action will remove employee from FY 2018 budget.
	<i>NH New Hire</i>	New Employee beginning on or before September 1 that is not in your spreadsheet.
	<i>PI Promote In</i>	Employee is being promoted into a new pin.
	<i>PO Promote Out</i>	Employee is leaving their current position (PIN) for another position of higher rank.
	<i>PW Promote Within</i>	Employee is being promoted within their current position (PIN), known as a reclassification. A reclass must be done in Great Jobs. Denote PD # in Field 13.
	<i>RE Retire</i>	Employee is retiring from their position, 8/31 or before. Action will remove employee from FY 2018 budget.
	<i>TI Transfer In</i>	Employee is transferring into a new position (PIN) of equal rank.
	<i>TO Transfer Out</i>	Employee is leaving their current position (PIN) for another position of equal rank.
	<i>VT Voluntarily Terminate</i>	Employee is resigning their position, 8/31 or before. Action will remove employee from FY 2018 budget.
Field 6	<b>Pay Indicator</b>	Prepopulated / Do not change unless the employee is being reclassified from a biweekly to a monthly position, or if an employee is increasing/reducing percent effort.
Field 7	<b>Annual Term From</b>	Prepopulated with 9/1. <b>DO NOT CHANGE.</b>
Field 8	<b>Annual Term Thru</b>	Do not change, unless employee is TAMU Faculty with SIP (Salary Incentive Program) and must be taken back to their base appointment
Field 9	<b>Annual Term</b>	Do not change, unless employee is TAMU Faculty with SIP and must be taken back to their base appointment
Field 10	<b>Position Percent Effort</b>	Do not change, unless employee is increasing/decreasing percent effort.
Field 11	<b>Current Position Title Code</b>	Prepopulated / <b>DO NOT CHANGE.</b>
Field 12	<b>New Position Title Code</b>	Enter only if employee is being reclassified within their current PIN, or is receiving a faculty promotion.
Field 13	<b>Reclass # from Great Jobs</b>	For all title changes, Reclass must be completed in Great Jobs.
Field 14	<b>Position Action Code</b> <i>Choices Available:</i>	
	<i>CP Change Period</i>	Enter only if employee is increasing/decreasing their percent effort.
	<i>CT Change Title</i>	Enter only if changing the title for the current PIN. See Field 5 (Promote Within) and Field 12 above.
	<i>EL Eliminate Position</i>	Enter for all actions vacating a PIN. See Field 5 above for - IT, PO, RE, TO, VT.
Field 15	<b>Adloc Part</b>	Prepopulated / <b>DO NOT CHANGE.</b>
Field 16	<b>Adloc Account</b>	Prepopulated / <b>DO NOT CHANGE.</b>

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<b>Field #</b>	<b>Field Description</b>	<b>Instructions</b>
Field 17	<b>Hourly / Monthly</b>	H = Hourly / M = Monthly
Field 18	<b>FTE Current Rate</b>	Prepopulated / <b>DO NOT CHANGE.</b>
Field 19	<b>Rec 0 Rate: Monthly or Hourly</b>	All Salary Enhancement Program (SEP) participants must be taken back to base salary. Use Rec #0 ONLY for SEP employees. Base rate must be entered as monthly rate. Also use this field to remove stipend for budget purposes.
Field 20	<b>Rec 0 Salary Action</b>	OT - Other
Field 21	<b>Rec 1 Rate: Monthly or Hourly</b>	Salary rate for recommendation 1 will be used for promotes. Rate must be entered as the hourly rate for all biweekly employees, or the monthly rate for all monthly employees.
Field 22	<b>Rec 1 Salary Action 1</b>	<b>PP</b> - Pay plan adjustment
Field 23	<b>Rec 1 Salary Action 2</b>	<b>PI</b> - Promotion Increase- involving change in title
Field 24	<b>Rec 2 Rate: Monthly or Hourly</b>	Salary rate for recommendation 2 if employee is receiving an <b>add to base</b> Merit Increase. Rate must be entered as the hourly rate for all biweekly employees, or the monthly rate for all monthly employees.
Field 25	<b>Rec 2 Salary Action 1</b>	<b>ME</b> - Merit Increase
Field 26	<b>Rec 3 Rate: Monthly or Hourly</b>	Salary rate for recommendation 3 if employee is receiving an <b>Equity Increase</b> . Rate must be entered as the hourly rate for all biweekly employees, or the monthly rate for all monthly employees.
Field 27	<b>Rec 3 Salary Action 1</b>	<b>EQ</b> -Equity Increase- Approved Justification Letter is required
Field 28	<b>Source From Date</b>	Date to begin using the account
Field 29	<b>Source Thru Date</b>	Date to stop using the account
Field 30	<b>Source Part</b>	Part number of salary source account- Example: 02 / 06 / 07 /20
Field 31	<b>Source Account</b>	6 digit valid account number. Please make sure accounts are un-expired in FAMIS.
Field 32	<b>Support Account</b>	5 digit support account
Field 33	<b>Source Accounting Analysis</b>	Must be entered. See Accounting Analysis sheets attached.
Field 34	<b>Subcode</b>	Object Class Codes. See sheets attached.
Field 35	<b>Source Title Code</b>	Title Code used above
Field 36	<b>Source Percent Effort</b>	Percentage to be charged on account
Field 37	<b>Source Program Code</b>	n/a
Field 38	<b>Source MSO</b>	<b>DO NOT CHANGE</b>