

FY 2023 Budget

The Position Budgeting Application

Agenda

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Position Budgeting Application Access

- Application is accessed through SSO
- Previously submitted unit SORs will remain in effect- unless changes noted. Submit new SORs for any additions
- Departmental update access to adlocs (multiple workstations can be accessed in application if applicable) based on Statement of Responsibility submitted

Position Budgeting Application and Workday

Position Budgeting Application and Workday

- PBA will be used to create FY23 Goldplate budget
 - Access is granted by adloc
 - Data uploaded one time from Workday (snapshot date) for current budgeted positions. Position details and current cost allocations are imported.
 - PBA allows units to update positions (e.g. vacate), add new positions, modify term, job profile, effort and other variables (these will only reflect in Goldplate and other budget documents, they do NOT feed to Workday)
 - Unit tracking is required for changes to positions after snapshot date to ensure that data in PBA and Workday align (e.g. transfers, new hires, compensation changes prior to 9/1, vacates). ***This may require double entry in both PBA and Workday to ensure the most accurate salary budget and resulting FY23 encumbrance data in FAMIS.*** Reports comparing PBA and active Workday will be provided to units to assist.
 - Units will submit salary recommendations (merit, promote, equity) to budget office via a template, which will be uploaded to the PBA (department head approval required for initial and subsequent salary adjustments).
 - Cost allocations for FY23 can be entered in PBA and will import to Workday. ***If no changes are made to cost allocations in the PBA, they will NOT feed to Workday.***
 - ***ONLY Cost allocations feed from PBA to active Workday.***
 - ***Salary actions (merit, promote, equity) will be fed from PBA to Workday merit module and will then feed from Workday merit module to active WD***

Position Budgeting Application Best Practices

Position Budgeting Application Best Practices

- Costing Allocations
 - If no active worker or position restrictions exist in Workday at snapshot date, the agency default account will populate. (Eg –the last costing allocation interval in Workday has an end date of 8/31/2022.) Any costing allocation “gaps” will also populate with the agency default account. These costing allocations **must** be updated/corrected in the PBA by the unit. Budget office will identify those on default in PBA and reach out to units.
 - The first interval must start 9/1/22 and the last costing allocation interval must be open ended. Project Zero accounts can be used for budgeting.
 - For appointments with effective dates prior to 9/1 (e.g. 8/15-5/15), costing and 901 will account for both terms.
 - Valid accounts as recognized in Workday will be available for costing, and will reflect o6 and o7 member variables (e.g. o6-1YXXXX and o7-129000-2Y000).
 - All Extension federal accounts 17xxxx **MUST** be updated in PBA to use the appropriate Extension federal accounts for FY23.
 - Costing allocations changed in PBA will default to feed to Workday, however, you can select to not feed.
 - Extension and Research do not budget vacant positions however the PBA can be used to review, update and feed new position restriction cost allocations to Workday (we highly encourage units to remove grant accounts in position restrictions and use project zero or other unit accounts).
 - When fed to Workday (August 25 tentatively), costing allocations **updated in the PBA** will override any existing costing currently in WD for 9/1/22 on.

Position Budgeting Application Best Practices

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- FY 23 salary recommendation template with merit/equity and promote will be submitted to the budget office. Edits to submitted recommendations must be submitted to budget@ag.tamu.edu with department head approval. *Note- the **entire** template must be resubmitted with DH approval-not just individual changes.
 - Anticipated vacancies and new hires that will be effective on or before 9/1 can be adjusted/created in the PBA. Best practice - create the position in workday- then create new position in PBA using "Add position" tab. *New Position ID's will feed from Workday to PBA nightly (it will be the P-XXXX format)
 - When adding a new position, ensure that "primary job" box is checked (or data will not feed to budget reports)
 - Changes to a position/cost allocation must be saved (blue save button). If any errors exist, save will not appear. Once changes are saved, select "X Close tab" to exit position.
 - The "History" section will provide the UIN that made the last change to position in PBA, however, if the "revert changes" button is selected, the position and costing data will revert to the snapshot (and History will clear)
 - ALL budget reports (and Goldplate) generate from PBA data
 - There is a Help site accessible by the "Help" button on the top right of PBA
 - The application performs best in Chrome or Firefox browser. (Internet explorer is not recommended)

Position
Budgeting
Application
Demonstration

Testing link for demo

<https://sso-test.tamus.edu>

Follow up/ Questions

Reminders/Important dates

- Units to track events from May 19 (snapshot date) and enter in PBA to ensure Workday and PBA information is aligned.*Reports will be provided to units.
- PBA opens May 31- Closed July 27
- PBA final salary recommendations will be uploaded to Workday Merit module.
- PBA costing allocations (**if modified in PBA**) will be uploaded to Workday after the last biweekly payroll in August processes.
- Workday Merit will be launched to the budget office (no merit tasks to the units/department heads)

Contacts

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