

# B/P/P Operations Center

## **Active Budget File**

### Section Four

**Revised Edition**  
March 3, 2009

## ON-LINE ACTIVE BUDGET MAINTENANCE

The Active Budget database contains information regarding the positions within the Texas A&M University System, including job titles, pay rates, sources of funding, the employee or occupant, and other pertinent data. It also reflects changes that occur and includes the dates during which these changes are in effect.

Various screens and transactions provide all update and inquiry capabilities necessary for normal maintenance of the Active Budget database. This maintenance includes correcting existing positions or Position Identification Numbers (PINs), creating new iterations for existing PINs, creating new PINs, requesting a printed copy of the details of a PIN (Form 500), withdrawing a request for a Form 500, or reactivating a position.

There are two general types of “positions” defined within the Active Budget. The first is a “budgeted” position. These positions are more permanent in nature and are established after justification of the need for this position within the organization. Work of a temporary or seasonal nature is not budgeted, and employees are placed on “wages.” These “positions” are linked directly to one employee and when the employee terminates, the “wage” record is terminated.

A unique PIN identifies each position in the budget. This number will stay with the position as long as the position exists. The PIN is made up of two parts. The first character is the Workstation Code. This code roughly equates to a payroll office or the office assigned to process budget, personnel and payroll records for the particular department within The Texas A&M University System. The second portion of the PIN is a unique sequence number. For budgeted positions, this number is a computer generated five (5) digit number. For Wage “positions”, this number is the social security number of the employee.

Changes in the state or status of a PIN are reflected in the establishment of a new “Iteration.” At the start of a new year, the initial state of a position is defined as iteration **01**. The iteration number is incremented by one for each change in status from this point throughout the fiscal year.

## System Standard Use Fields and Rules

General fields with their rules, uses, hints and techniques.

**SCREEN** (Next Screen, Screen Nbr) 3-digit code that identifies the next screen to be viewed; this is used to maneuver through the B/P/P System screens.

**UIN** (Universal Identification Number) 9 digit number assigned by TAMUS to identify students, staff, faculty, dependents in and between TAMUS systems. Generally the preferred 'key' for finding persons in the system through screens or reports. Pattern is NNN00NNNN where position 4 and 5 are zeros.

**SSN** (Social Security Number) 9 digit number assigned by Federal agency for US residents. Where possible should be protected data for screens and reports




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### RULES - -

?Help:	Symbol ( ? ) is used next to field names, like <b>Screen ?</b> , to show that there is a help function related to that data field. After the cursor has been placed in/on the field area, pressing <F1> will display the help information related to that field. In the case of <b>Screen</b> , the multiple values possible for input to the screen number can be viewed or selected. If pressing <F1> gives you the message 'WNMP0101 0253 NAT1148 No help available for this data field.' then there no current help for that field on this screen

## TERMINAL SCREENS

There are five terminal screens in the Active Budget database Inquiry/Update procedure. The screens and the codes used to reference them follow:

<u>SCREEN CODE</u>	<u>GENERAL DESCRIPTION</u>	<u>SEE PAGE</u>
050	<b>FUNCTION SELECT SCREEN</b> - used to select the desired function and/or screen to be processed.	4.6
051	<b>POSITION/OCCUPANT/SALARY SCREEN</b> - used to view and maintain data pertaining to the position itself, the occupant of the position and the salary or rate of pay of the occupant.	4.12
052	<b>SOURCE SCREEN</b> - used to view and maintain data pertaining to the actual source(s) of funding for a position.	4.21
053	<b>COMMENT SCREEN</b> - used to view and maintain explanatory comments pertaining to the PIN being processed.	4.28
054	<b>PERQUISITE SCREEN</b> - used to view and maintain data pertaining to the actual source(s) of funding for non-cash compensation for the occupant of the PIN being processed.	4.31

The terminal operator may traverse the screens in the order listed above (default sequence) or may select the next screen desired by entering the corresponding code in the SCREEN field of the screen being processed. An invalid NEXT SCREEN code will result in the default being taken.

It should be noted that under the NEW PIN or NEW ITERATION Functions the screen sequence is limited to a certain series of patterns as indicated on the following page. A **Y** indicates a valid NEXT SCREEN code.

The two-character screen codes used in the past can also be used to select specific screens. The following chart provides a cross-reference of these old and new codes. These alpha codes are valid only within the Active Budget screens. You must use the three-digit numeric code to move to/from another sub-system within the B/P/P System.

<b>SCREEN CODES</b>	
<b>Numeric</b>	<b>Alpha</b>
<b>050</b>	<b>Eb</b>
<b>051</b>	<b>PO</b>
<b>052</b>	<b>AS</b>
<b>053</b>	<b>AC</b>
<b>054</b>	<b>AP</b>

**FUNCTION INQUIRY:**

## NEXT SCREEN CODE

FROM SCREEN	051	052	053	054	050
050	Y	Y	Y	Y	Y
051	Y	Y	Y	Y	Y
052	Y	Y	Y	Y	Y
053	Y	Y	Y	Y	Y
054	Y	Y	Y	Y	Y

**FUNCTION NEW PIN:**

## NEXT SCREEN CODE

FROM SCREEN	051	052	053	054	050
050	Y				
051		Y			
052			Y		Y
053				Y	Y
054					Y

**FUNCTION NEW ITER:**

## NEXT SCREEN CODE

FROM SCREEN	051	052	053	054	050
050	Y				
051		Y			Y
052		Y	Y	Y	Y
053		Y	Y	Y	Y
054		Y	Y	Y	Y

## **SPECIAL PROCESSING NOTES**

In an Inquiry mode, the terminal operator can move from one position to another, change the iteration or change the fiscal year of the position being viewed without returning to the function selection screen.

To move from one position to another position while staying on the same screen currently displaying data for a position (050, 051, 052, 053, or 054), change the PIN number and blank out the iteration number. This will return the most current iteration for the position specified to the screen.

To display an earlier iteration of the position being displayed, simply change the iteration number. This will cause the specific iteration requested to be displayed.

## **HIGHLIGHTED MESSAGES**

Certain messages are periodically displayed on the screens to give information and/or indicate the presence of errors detected during processing. These messages are displayed in a brighter intensity than are the other fields on the screen.

It should be noted that on all Active Budget Database screens except the Function Select screen, the current function, PIN, iteration and fiscal year are always displayed at the brighter intensity.

## **MESSAGES COMMON TO TWO OR MORE SCREENS**

The following message may appear on any one of the five screens used to access the Active Budget database:

**HIGHLIGHTED FIELD(S) IN ERROR** - Required data was not entered, or invalid data has been entered. The screen will not be processed until valid data has been entered.

The following message may appear on any screen except for the Source Screen (052):

1. **PCT-EFFORT OUT OF BALANCE** - The month-by month sum of all the source percent efforts does not equal the position percent effort for the PIN and iteration being processed.
2. **SRC MONTHLY PAY OUT OF BALANCE** - The month-by month sum of all source monthly pays does not equal the FTE monthly salary for the PIN and iteration being processed.
3. **PCT-EFT & SRC MONTHLY PAY OUT OF BALANCE** - Both of the above mentioned conditions are present.

## SCREEN 050 - FUNCTION SELECT

This screen is used to gain initial access to the Active Budget database on-line maintenance system. All of the various functions of the system are accessed from this screen.

After proper sign-on has been completed, the user may access this screen either through the BPP Menu screen.

Any one of the various functions may now be selected.

### DESIRED FUNCTION

#### CODE

#### GENERAL DESCRIPTION

- |       |  |
|-------|--|
| Blank | <p><b>INQUIRY</b> - The user may view any or all data on the Active Budget database for the specified PIN, iteration and fiscal year.</p> <p>In INQUIRY mode, the user is free to move from one PIN to another, change ITERATIONS within the same PIN or even change the fiscal year without returning to the function select screen. This allows a great deal of freedom in viewing records for a particular position or person.</p>  |
| C     | <p><b>CORRECTION</b> - This function is used to correct data that is already on the Active Budget database. The user is presented with the data on the Active Budget database and is given the opportunity to change the data or add new data items. All data fields are edited prior to allowing the user to proceed to the next requested screen.</p>  |
| I     | <p><b>NEW ITERATION</b> - This function is used to create a new iteration for a PIN which is already on the Active Budget database. The user is presented with the data from the last non-withdrawn iteration of the selected PIN and is given the opportunity to input changes to the budget. These changes will be reflected in the next iteration being added to the database. All data fields are edited prior to allowing the user to proceed to the next requested screen.</p> |
| N     | <p><b>NEW PIN</b> - This function is used to create a new position on the Active Budget database. The user is presented with empty screens upon which the data for the new PIN should be entered. All data fields on the screens are edited prior to allowing the user to pass to the next requested screen.</p>   |
| R     | <p><b>REACTIVATE PIN</b> - This function is used to reactivate a PIN that is no longer on the Active Budget database. The user is presented with empty screens upon which the data for the new PIN should be entered. All data fields on the screen are edited prior to allowing the user to pass to the next requested screen.</p>  |

**DESIRED  
FUNCTION  
CODE**

**GENERAL DESCRIPTION**

- |   |  |
|---|--|
| S | <b>SCHEDULE FORM 500</b> - This function causes a printed copy of the data relevant to the specified PIN and iteration (FORM 500) to be produced via batch (off-line) processing at a later time. If the requested iteration has a status of <b>C</b> (Cleared), a FORM 500 <b>T</b> will be produced. Otherwise, a FORM 500 <b>R</b> will be generated. |
| W | <b>WITHDRAW FORM 500 FROM SCHEDULING (Printing)</b> - This function prevents the production of a FORM 500 for the specified PIN and iteration which had previously been scheduled.   |

To return to the Function Select Screen from any screen in the Active Budget System, either press the **PF3** key, or enter **050** or **E** in the next screen code field.

## SCREEN 050 - ACTIVE BUDGET MAINTENANCE FUNCTION SELECT SCREEN

050 TAMUS B/P/P System - Active Budget Maintenance	09/24/01 16:50 P BPP0002 0037
Screen: <u>  1  </u>	
Function: <u>  2  </u>	Blank = Inquiry C = Correction I = New Iteration N = New PIN R = Reactivate PIN S = Schedule form 500 W = Withdraw form 500 from scheduling
PIN: <u>  3  </u>	
Iteration: <u>  4  </u>	
Screen: <u>  5  </u>	PO = Position/Occupant/Salary AS = Source AC = Comment AP = Perquisite
Year: <u>  6  </u>	
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---	
Help	Exit Main

## SCREEN 050 - ACTIVE BUDGET MAINTENANCE FUNCTION SELECT SCREEN EDIT DEFINITIONS

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
1	SCREEN	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens.
2	FUNCTION	One of the valid codes listed on the screen
3	PIN (Position Identification Number)	Valid workstation immediately followed by: <ul style="list-style-type: none"> <li>a) an SSN for Wage PINs</li> <li>b) a five-digit budget sequence number</li> <li>c) '90000' for adding a new graduate assistant PIN, or</li> <li>d) '99999' for adding a new budgeted PIN</li> </ul>
4	ITERATION	Number or blank (default: last iteration on the database)
5	SCREEN	One of the valid codes listed on the screen, or blank (default: goes to PO screen)

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
6	FISCAL YEAR	Fiscal Year selected must either be on Tables Database, Screen 413 – Fiscal Year Maintenance Table or blank (default: current fiscal year on Screen 413)

## PROCESSING NOTES

### INQUIRY

In inquiry mode, the terminal operator is not able to effect any changes to any of the data elements on any of the Active Budget Screens. The cursor is limited to move to fields that may be changed that will cause a different record in the Active Budget to be displayed.

### CORRECTION

This mode is most frequently used to make a minor change in a position which results in no fiscal impact. It is most often used to correct an error made through the Iteration mode. Examples would include such items as correcting an employee's name and SSN. If it follows immediately after creating a new iteration, other items could be corrected which will have fiscal impact, such as correcting the rate of pay or the number of months budgeted.

**Caution:** This function should not be used to change the rate of pay resulting in a new budget action, such as a merit increase or to change the funding sources for the remainder of a fiscal year.

On the Position Occupant Screen (051), changes are entered in the R or recommendation line on the screen, and the data will overlay the C or current line. To blank out an optional field (like Source Control), enter all dashes (----) in the field.

### NEW ITERATION

This function is used to define a new status for a position. This function should always be used if the new situation alters the fiscal impact of a position, either through increasing or decreasing the funding requirement or altering the distribution of the funds among the various funding sources. This would include such items as merit increases, new funding sources (new research contract), changing the percent effort or changes in period of employment. On the Position/Occupant Screen (051), the current situation is displayed on the C line and only those items being changed need to be entered on the R or recommendation line. Those items not changing will be brought forward to the new iteration. The iteration effective end date will be automatically updated on the old iteration to be the day previous to the effective start date of the new iteration. As with the correction mode, to blank out a field, enter all dashes (----).

### NEW PIN

This function is used to create a new position in the Active Budget. Required data fields must be entered and edits passed before segments are entered into the database. Some required fields may be left blank and the program will update these fields with either system defaults or defaults defined in other databases (such as the FLSA code in the Tables database for Title Codes). The terminal operator has the option of specifying the PIN to be used or letting the BPP System calculate the next available PIN. The new system calculated PIN for budgeted positions is not displayed until the Position/Occupant/Salary Screen (051) has been processed successfully. The new number is presented on the Source Screen (052) after the 051 screen has completed processing the information. All required data fields must pass system edits before the data is stored in the Active Budget database. There are some fields that, if left blank, will be filled with default values (i.e., FLSA code will be set to default value defined on the Title Code table). Data is entered into the R or recommended line of the Position/Occupant Screen (051).

**SCHEDULE FORM 500**

This function is used to flag a particular iteration of a position for printing. There are two types of Form 500s generated, based on the iteration status code. A Form 500T is generated if the iteration status code is set to **C**. Only the current situation of the PIN is printed on the **C** or current line of the Form 500. If the iteration status is **S** or **P**, then a comparison is made between this iteration and the preceding iteration with an iteration status of **C**, **S**, or **P**. Any funding changes will be analyzed and identified. The flagged iteration will appear on the **R** line of the Form 500 while the data from the preceding iteration will appear on the **C** line.

**WITHDRAW FORM 500**

This function is used to stop the printing of a Form 500 that had been previously scheduled to print. This function should not be confused with the “withdraw” iteration status - which means that a particular iteration is not approved and has been withdrawn from consideration for budget and payroll processing. This function has no effect if the Form 500 has already been printed, and since the scheduled forms are printed each evening, there is most likely little opportunity or need to use this function.

## MESSAGES UNIQUE TO THE FUNCTION SELECT SCREEN

1. **DATA BASE UPDATED - SCHEDULE FORM 500?** - A correction has been made to the database, and the operator is being given the option of scheduling a FORM 500 for later printing.
2. **FORM 500 SCHEDULED - PIN XXXXXXXXXXXX** - The indicated PIN has been scheduled for later printing of a FORM 500.
3. **FORM 500 WITHDRAWN - PIN XXXXXXXXXXXX** - The indicated PIN has been withdrawn from FORM 500 scheduling (i.e. no FORM 500 will be printed).
4. **INQUIRY COMPLETE** - All inquiries to the previously selected PIN have been completed.
5. **NEW ITERATION ADDED - SCHEDULE FORM 500?** - The indicated iteration has been added to the database, and the operator is being given the option of scheduling a FORM 500 for later printing.
6. **NEW PIN ADDED - SCHEDULE FORM 500?** - The indicated PIN has been added to the database, and the operator is being given the option of scheduling a FORM 500 for later printing.
7. **PIN ALREADY EXISTS ON DATA BASE** - An attempt was made to add a wage PIN to the database, but the specified PIN was already on the database for the selected fiscal year.
8. **PIN HAS '?' ITER. STATUS - NOT SCHEDULED** - An attempt was made to schedule a FORM 500 for a PIN, but the PIN had the indicated iteration status.
9. **REQUESTED PIN NOT ON DATA BASE** - The selected iteration of the requested PIN was not on the database for the fiscal year selected.
10. **FUNCTION NOT ALLOWED AT THIS TERMINAL** - The user attempted to perform a function which is not allowed at the terminal in use. If the terminal should be allowed to perform the requested function, contact the B/P/P Operations Center.
11. **PIN REACTIVATED - SCHEDULE FORM 500?** - The indicated PIN has been reactivated on the database and the operator is being given the option of scheduling a FORM 500 for later printing.

## SCREEN 051 - POSITION/OCCUPANT/SALARY SCREEN

This screen contains data relating to a particular iteration of a PIN, the occupant of that PIN, and the salary of the occupant. There is a great deal of interdependence between various data fields on this screen. Because of this, the data in one field may be valid unless another field contains data of a particular value that causes the first field's data to be considered invalid. For example, under the NEW ITERATION function, if the recommended Position Action (field 14) is **RA** (Reassign Administrator), the recommended ADLOC (field 3) must contain a valid ADLOC. If any other value is entered for the recommended Position Action, the recommended ADLOC may be left blank.

In some cases, a particular field must be blank, and any non-blank data will cause an error condition. For example, under the NEW ITERATION function, if the Recommended Occupant Action (field 21) is **NH** (New Hire), the recommended From PIN (field 19) must be blank. The interdependence of data can also cause errors to remain undetected until another error is corrected. For example, the Iteration Effective From Date (field 4) is used in editing the recommended ADLOC (field 3) and the recommended Title Code (field 12). If the Iteration Effective From Date is invalid, the editing of the ADLOC and Title Code will be incomplete.

To simplify the operator's task of entering the data, some of the data fields are automatically filled in by the processing program and require no operator input, and other fields are not accessible for input under certain conditions.

Some of the fields are allowed to contain spaces as valid data. Each of these fields can be made blank by typing all dashes ('--') in the field. The fields and their corresponding numbers on the screen layout are:

- Annual Term Modifier (13)
- District (15)
- County (16)
- Position Action (iteration 01 only) (19)
- Occupant Effective Thru Date (23)
- From PIN (24)
- To PIN (25)
- Recommended Occupant Action (27)
- Source Control (30)
- Pay Step (non-classified title codes only) (32)
- Pay Type (35)
- Salary Action (only during CORRECTION function) (36)

## SCREEN 051 - POSITION MAINTENANCE

```

TAMUS B/P/P System - Position Maintenance                                09/25/01  09:21
                                                                    BPP0002  0008
Screen:  1                                                            Status Date
PIN   2  Iter  3 FY  4  Chng No  5      Current
Next   6   7
*Position*                    10
      Effective      Annual Term Data  Assignmt  Titl  FLSA  Pos
      ADLOC      From Thru  From Thru  Mod Mths  Dst  Cty  Code  Code  Act
C
R   8    9  10  11  12  13  14  15  16  17  18  19
*Occupant*
      Name                SSN      Effective      From      To      Occp
      Name                SSN      From      Thru      PIN      PIN      Act
C 20  _____  21  22  _____  23  _____  24  25  26
R _____  _____  _____  _____  _____  _____  _____  _____  _____  27
*Salary*
      Percent  Pay  Src  Range      FTE      FTE  Pay  Salary
      Effort  Ind  Ctl  /Step      Mthy/Hr  Budget  Typ  Action
C
R 28  29  30  31 32  33  34  35  36  _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      EXIT  MAIN  PREV  NEXT
    
```

### SCREEN 051 - POSITION MAINTENANCE EDIT DEFINITIONS

It should be noted that the **CHNG NO** field and almost all of the fields on the current **C** line are inaccessible regardless of what function is being performed.

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
1	SCREEN	3-digit code that identifies the screen the user would next like to view; is used to maneuver through the B/P/P System Screens.
2	PIN (Position Identification Number)	Valid workstation immediately followed by: <ul style="list-style-type: none"> <li>a) an SSN for Wage PINs</li> <li>b) a five-digit budget sequence number</li> <li>c) '90000' for adding a new graduate assistant PIN, or</li> <li>d) '99999' for adding a new budgeted PIN</li> </ul>
3	ITERATION	Number of blank (default: last iteration on the database)

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
4	FISCAL YEAR	Fiscal Year selected must either be on Tables Database, Screen 413 – Fiscal Year Maintenance Table or blank (default: current fiscal year on Screen 413)
5	CHNG NO	Inaccessible regardless of what function is being performed.
6	ITERATION STATUS	Required field for function codes <b>I, N, or R</b> ; generally defaults to <b>S</b> C - Cleared D - Disapproved E - End of Term P - Pay W - Withdrawn S - Suspense R - Retroactively over-ridden (Only C, P, S will generate payroll transactions.)
7	ITERATION STATUS DATE	Required field for function codes <b>I, N, or R</b> ; generally defaults to today's date. Numeric; MMDD format.
8	ADLOC	Required field on Tables database
9	ITERATION EFFECTIVE FROM DATE	Required field - numeric; MMDD format
10	ITERATION EFFECTIVE THRU DATE	Required field - numeric; MMDD format
11	ANNUAL TERM FROM DATE	Required field - numeric; MMDD format; DD must be <b>01</b> or <b>16</b>
12	ANNUAL TERM THRU DATE	Required field - numeric; MMDD format; DD must be '15 or last day of month
13	ANNUAL TERM MODIFIER	Required field - defaults to blank Blank - No break in term A - Break from 0601-0715 B - Break from 0116-0531 C - Break from 0116-0715 D - Other (non-specified)

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
14	ANNUAL TERM MONTHS	Required field - defaults to calculated value if Annual Term Modifier <b>D</b> based on annual term dates. $0.5 < \text{Annual Term Mths} < 12.0$ . Computer generated unless Field 8 is <b>D</b> .
15	DISTRICT	Optional field - blank or numeric; must be on Tables Database
16	COUNTY	Optional field - blank or numeric; must be on Tables Database (for Part 11, must be $> 300$ )
17	TITLE CODE	Required field - numeric; must be on Tables Database
18	FLSA CODE	Required field - defaults to value on title code table A - Administrative (exempt from overtime) E - Executive (exempt from overtime) P - Professional (exempt from overtime) X - Partially Exempt (sometimes exempt from overtime) N - Nonexempt (not exempt from overtime)
19	POSITION ACTION	Required field. CP - Change Period CR - Create (Iter 1 Only) CT - Change Title EL - Eliminate ET - End of Term OA - Other Action RA - Reassign Administrator RC - Reclassification RP - Reactivate Position RT - Retroactive
20	NAME	Required field - minimum of four characters <i>Last Name First Name MI Sufx</i> format
21	SOCIAL SECURITY NUMBER	Required field - numeric, nine digits; if unknown, enter '88888888'; for vacant PINs, '99999999'
22	OCCUPANT EFFECTIVE	Required field - numeric; MM DD YYYY format

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
23	OCCUPANT EFFECTIVE THRU DATE	Optional field - numeric; MM DD YYYY format
24	FROM PIN	Required field for some occupant actions. Valid workstation immediately followed by: a) blanks for Wage PIN b) a five-digit budget sequence number, or c) '99999' for unknown budgeted PIN
25	TO PIN	Required field for some occupant actions. Same as 19 above.
26	CURRENT OCCUPANT ACTION	Required field for some functions. CN -Change Name CT -Change Title DO -Demote Out DW -Demote Within IP -In-grade Promotion IT -Involuntarily Terminated NH -New Hire NO -No Occupant (Wage Pins Only) PO -Promote Out PW -Promote Within RE -Retire RH -Reappoint SL -Start Leave TO -Transfer Out VA -Vacant (budgeted pins only) VT -Voluntarily Terminated
27	RECOMMENDED OCCUPANT ACTION	Required field for some functions. DI -Demote In NH -New Hire RH -Reappoint PI -Promote In TI -Transfer In RC -Reclassification RL -Return Leave NO -No Occupant (Wage Pins Only) VA -Vacant (Budgeted Pins)

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
28	PERCENT EFFORT	Required field - numeric; 25.0 < PCT < 100.0 (A PINs: 25.0 < PCT < 150.0)
29	PAY INDICATOR CODE	Required field. A - Monthly Full Time Budgeted Position B - Monthly Less Than 100% Budgeted Position C - Monthly Student Worker D - Biweekly Full Time Budgeted (overtime paid) E - Biweekly Less Than 100% Budgeted (overtime paid) F - Biweekly Student Worker (overtime paid)  H - Biweekly Less Than 100% Budgeted (overtime not paid) I - Biweekly Student Worker (overtime not paid) * A and F All Work Stations H and I - A, F, H, J, and S
30	SOURCE CONTROL	Optional field Blank - Sources amounts calculated from % effort L - Source amounts are locked, % effort calculated
31	PAY RANGE	Required field for Classified Title Codes. Computer generated from Tables database from Title Code (field 12), if left blank.
32	PAY STEP	Required field - computer generated if left blank. A Thru L - On step designated W - Within Range But not on Step X - Out of Town Y - Below Range Z - Above Range
33	FTE MONTHLY/HOURLY RATE	Required field -numeric; 1.00 < Rate < 99999.99. Rate Computer generated from either Pay Range/Step or FTE Budget Salary if left blank.

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
34	FTE BUDGET SALARY	Required field – computer generated from FTE Monthly/Hourly rate if left blank. Numeric; FTE Monthly Annual Term Months; $400 < (FTE \text{ Annual Salary} / \text{Annual Term Months}) < 50,000$ . NOTE: This field is in whole dollars, not dollars and cents.
35	PAY TYPE	Optional field - blank or <b>P</b> he use of a pay type <b>P</b> is designed for use on wage positions only to override the default pay type for a biweekly payroll. It is NOT intended o be used on regular wage employees. It is designed for those wage entries for employees who are also in a budgeted position. A pay type <b>P</b> will not have optional payroll deductions made; these deductions will be taken on the employee’s regular budgeted payroll.
36	SALARY ACTION	Optional field AB - Across the board increase AD - Administrative Change CE - Change Effort CF - Correct File (Valid During Correction) DE - Decrease EQ - Equity Increase IN - Increase MA - Mandated Increase ME - Merit Increase PP - Pay Plan Adjustment PI - Promotion Increase OA - Other Action SC - Status Change

## SCREEN 051 - POSITION MAINTENANCE SPECIAL FEATURES

1. The rate of pay may be indicated in one of three ways:
  - a. FTE Monthly/Hourly Rate (field 28)
  - b. FTE Annual Salary (field 29)
  - c. Pay Range and Pay Step (fields 26 and 27, respectively) (only usable for PINs having a classified Title Code (field 12))

If more than one of these has been filled in, the actual rate of pay will be determined by the hierarchical order in which the three methods are listed above. (i.e., if both FTE Annual Salary and Pay Range/Step are filled in, the FTE Annual Salary will determine the rate of pay)

2. Entering **VA** (Vacant) in the Recommended Occupant Action (field 21) for a budgeted PIN automatically results in 'VACANT' in the Name (field 14), '999999999' in the SSN (field 15), and spaces in the From PIN (field 18) and the To PIN (field 19).
3. Entering **NO** (None) in the Recommended Occupant Action (field 21) for a budgeted PIN automatically results in 'NONE' in the Name (field 14), '999999999' in the SSN (field 15), and spaces in the From PIN (field 18) and the To PIN (field 19).
4. During NEW ITERATION function processing, if the Position Action (field 13) is set to **EL** (Eliminate) for a budgeted PIN, the recommended Occupant Action is automatically set to **VA** (Vacant) and the results listed above (in number 2) will occur. Also, the sources are automatically zeroed out for the new iteration.
5. During NEW ITERATION function processing, entering **CN** (Change Name) in the current Occupant Action (field 20) will not change the Occupant Action on the database or any FORM 500.
6. An Iteration Status Code of **R** stands for 'Retroactively Overridden' and is used to prevent processing of an iteration that has been overridden by an iteration having an **RT** ('Retroactive') Position Action Code. Iterations having an **R** status code will be processed only by the program that processes or produces the FORM 500s.

The use of this new status code can best be shown by an example:

Mr. Jones is the occupant of PIN X12345 having the following iterations, effective dates and salaries:

<u>ITER</u>	<u>STATUS</u>	<u>EFFECTIVE DATES</u>	<u>SALARY</u>
01	C	0901 - 0131	10,000
02	C	0201 - 0831	11,000

In March, he receives an additional raise retroactive to 2/1, the same effective date as iteration 02. Iteration 03 is added, using **RT** for the Position Action. The screen-processing program automatically changes the status of iteration 02 to **R** when iteration 03 is added with an **RT** Position Action. The iterations now look like this:

<u>ITER</u>	<u>STATUS</u>	<u>EFFECTIVE DATES</u>	<u>SALARY</u>
01	C	0901 - 0131	10,000
02	R	0201 - 0831	11,000
03	S	0201 - 0831	11,500

The FORM 500 for iteration 03 will list iterations 02 and 03. All other budget-processing programs will ignore iteration 02.

CAUTION: For those parts using FAMIS, caution should be used when using this position action. Depending on budgeting and accounting practices, you may only want to enter future activity and not use this facility, as there may be problems with salary encumbrances. Obviously, it is the best business practice to always make FORM 500 changes to reflect future activity and not to correct past oversights.

## SCREEN 052 - SOURCE MAINTENANCE

This screen contains data relating to the source(s) of funding for the PIN and iteration being processed. Sources can be added, changed, and/or deleted via this screen, which can process up to five sources simultaneously. In order to process more than five sources, enter **NP** in the NEXT SCREEN field.

NEXT PAGE (NP) is used to access more data pertaining to the source screen (051) or the comment screen (052) when there is insufficient space on one screen to display all of the sources or comments. (This code is valid only for the source or comment screens.)

It should be noted that during the NEW ITERATION function, the old iteration's sources are copied to the new iteration and updated as necessary to reflect any changes in the salary information as input via screen 051. This occurs automatically, whether or not the terminal operator ever views screen 051.



<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
5	SOURCE EFFECTIVE THRU DATE	Required field - numeric, MMDD; day must be 15 or last day of month
6	SOURCE PART NUMBER	Required field - numeric, on Tables Database
7	SOURCE ACCOUNT NUMBER	Required field - numeric, on Tables Database
8	SOURCE SUPPORT ACCOUNT	Optional field - spaces or numeric
9	PROGRAM CODE/PROJECT CODE	Optional field - alphabetic for <b>08, 09, 12</b> sources. Blank for <b>B, G, H, I, J, L, N, P, R, T,</b> and <b>W</b> PINs.
10	ACCOUNTING ANALYSIS	Required field - first four characters must be numeric and at least one of them must be nonzero
11	OBJECT CLASS	Required field. <b>SALARIES:</b> 1110 - Salaries - Admin - Professional 1210 - Salaries - Extension - Faculty 1211 - Salaries - Extension - Faculty Equivalent 1215 - Salaries - Extension - County Agents 1220 - Salaries - Extension - Professional 1225 - Salaries - Extension - Classified 1310 - Salaries - Research - Faculty (Fac rank = 1,2,3,4,5) 1315 - Salaries - Research - Professional 1320 - Salaries - Research - Classified 1325 - Salaries - GAR - Professional (Fac Rank = 0) 1410 - Salaries - Teaching - Faculty (Fac Rank = 1,2,3,4,5) 1415 - Salaries - Teaching - GAT - Fac/Academ (Fac Rank = 0) 1420 - Salaries - Library - Faculty (Fac Rank = 1, 2, 3, 4, 5) 1510 - Salaries - Support Staff - Professional 1515 - Salaries - Support Staff - Classified 1525 - Salaries - GANT - Professional (Fac Rank = 0) 1599 - AMERICORP Living Expenses 1610 - Longevity Pay

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
11	OBJECT CLASS (con't.)	<p>Required field.</p> <p><b>WAGES:</b></p> <p>1710 - Wages - Faculty (Fac Rank = 1,2,3,4,5)</p> <p>1715 - Wages - Professional</p> <p>1720 - Wages - Classified</p> <p>1730 - Wages - Overtime</p> <p>1740 - Wages - Student</p> <p>1745 - Wages - Student (Federal College Work Study)</p> <p>1746 - Wages - Student (Federal Community Services)</p> <p>1750 - Wages - Student (State College Work Study)</p> <p>1755 - Wages - Student (Reading Tutors Progra</p> <p>1765 - Wages - Hazardous Duty Pay</p> <p>1770 - Wages - Lump Sum Term Pay-Vacation</p> <p>1775 - Wages - Termination Pay-Death Benefit</p> <p>1780 - Wages - Lump Sum Incentive Payment</p> <p>1940 - Emoluments and Allowances (Taxable Housing, Automobiles, Club Fees, etc.)</p>
12	BUDGET SEQUENCE NUMBER	Optional field - numeric or blank
13	PERCENT EFFORT	<p>Required field - numeric if source control on 051 screen is blank.<sup>1</sup></p> <p>1.0 &lt; PCT EFT &lt; 100.00) (A PINs: 1.00 &lt; PCT EFT &lt; 150.0) (can be zero for eliminated budgeted PINs)</p>
14	SOURCE AMOUNT	<p>Required field - numeric if source control on 051 screen is <b>L</b><sup>1</sup> (can be zero for eliminated budgeted PINs). For budgeted PINs, this is the annual amount in whole dollars. For wage PINs, it is an hourly rate in dollars and cents.</p>
15	MGMT/SUPER/OTHER FLAG	<p>M - Management</p> <p>S - Supervisor</p> <p>O - Other</p>

<u>NUMBER</u>	<u>DATA FIELD</u>	<u>EDITS PERFORMED</u>
16	PAY CODE	Used for Task Payments. Valid codes are: Blank or those listed in the tables file with a task payment code of <b>Y</b> . (See Table 420 for description). Required if the source title code is <b>8491</b> and the source part number is <b>02, 10, 20</b> or <b>23</b> .)
17	REQUIREMENT ACCOUNT	Optional field <sup>2</sup> - numeric, on Tables database (required if additional funding is needed for the budget change and the source account is on FAMIS)
18	REQUIREMENT SUPPORT ACCOUNT	Optional field <sup>2</sup> - space or numeric
19	REQUIREMENT OBJECT	Optional field <sup>2</sup> - numeric, on Tables database (required if additional funding is needed for the budget change and the source account is on FAMIS)

<sup>1</sup> Accessibility of two of the fields on this screen depends on whether or not the source control (SRC CTL) on the screen 051 is locked (**L**) or unlocked (blank). If the sources are locked, the Source Amount (field 13) is accessible, and the program calculates the Source Percent Effort (field 12). If the sources are not locked, the opposite is true. The Source Monthly Pay is always calculated by the program.

<sup>2</sup> These fields are required for those parts using FAMIS to have a FORM 500 processed and printed, if the change being requested in the budgeted position requires additional funding. An error will be reported if these fields are not present when processing for this position is attempted.

Once a source is on the database, certain fields cannot be changed. If one of these fields needs to be changed, the source must be deleted and re-added. These fields are:

Source Effective From Date (field 3)  
Source Part Number (field 5)  
Source Account Number (field 6)  
Source Support Account (field 7)

If an error is made in the Accounting Analysis (field 9) while attempting to change or delete a source, the Accounting Analysis can be restored to its original value by filling the ACTG ANAL field with blanks.

## SCREEN 052 - SOURCE MAINTENANCE MESSAGES

If any of the following messages appear, no updates to the database have been made. The screen will not be processed until the data has been corrected.

1. **DUPLICATE SOURCE(S) - NOTHING PROCESSED** - Processing of the screen would result in two or more sources on the database having the same key. The following fields are highlighted on the source(s) causing the problem:

Action Code (field 1)  
Source Effective Thru Date (field 4)  
Source Part Number (field 5)  
Source Account Number (field 6)  
Source Support Account (field 7)  
Accounting Analysis (field 9)

2. **MINIMUM: ONE SOURCE - NOTHING PROCESSED** - Complete processing of the screen would result in no sources at all for the PIN and iteration being processed. All PINs must have at least one source.
3. **TOO MANY SOURCES - NOTHING PROCESSED** - Complete processing of the screen would result in too many sources for the PIN and iteration being processed. The current maximum is 10 sources.





4	PERQUISITE EFFECTIVE THRU DATE	Required field - numeric, MMDD; day must be 15 or last day of month
5	PERQUISITE PART NUMBER	Required field - numeric; on Tables Database
6	PERQUISITE ACCOUNT	Required field - numeric; on Tables Database
7	PERQUISITE SUPPORT ACCOUNT	Optional field - space or numeric
8	PERQUISITE ACCOUNTING ANALYSIS	Required field - first four characters must be numeric and at least one of them must be nonzero.
9	PERQUISITE DESCRIPTION	Required field - non-blank
10	PERQUISITE AMOUNT	Required field - numeric; greater than zero

Once a prerequisite is in the database, certain fields cannot be changed. If one of these fields needs to be changed, the prerequisite must be deleted and re-added. These fields are:

Prerequisite Effective From Date (field 2)  
Prerequisite Part Number (field 4)  
Prerequisite Account Number (field 5)  
Prerequisite Support Account (field 6)  
Prerequisite Accounting Analysis (field 7)

It should be noted that after deletion and addition of some prerequisites, the Prerequisite Sequence Numbers may not be consecutive. This is normal, and the prerequisites will appear on a FORM 500 in the same sequence that they appear on the screen.