Agenda

- PBCS Overview
- Using PBCS Workspace
- Reports
- Position Budget Forms
- Fringe Calculations
- Transfer Forms
- Department Budget Forms
- Contacts and Resources
PBCS Overview
What is PBCS?

Planning and Budgeting Cloud Service is a budgeting and planning application that allows users to:

• Identify proposed revenues and expenditures for the upcoming fiscal year.

• Compare current and prior year’s operating budgets.

• Manage position related data such as salary, distribution allocation, and position status (filled or vacant).

PBCS Overview
PBCS is used to submit budget plan for future budgets.

- Departments submitted budget plan for previous FY
- Budget information is reflected in UTShare as of the start of the FY
- Users can view information that was previously submitted
- Budget planning for new FY will begin according to Budget Office calendar
FY budget will be completed in PBCS.

– A copy of the current FY operating budget listing revenues, expenses, and transfers will be loaded into PBCS.

– Any changes or updates made in PBCS are effective for the new budget year starting September 1.

– Budget Process Calendar is posted on Budgets’ [website](#)
Budget Administrators are responsible for:

- Reviewing Position information to ensure all budgeted positions and employees are included in the new budget year.
- Updating Intrafund Transfers on a “Source” basis.
- Reconciling Revenues and Expenses for each Cost Center.
Per the Budget Office, all active cost centers must be budgeted in PBCS. The only exceptions are cost centers that:

- Do not generate revenue or use carry forward balances to pay expenses.
- Begin with a 9 (Agency cost centers)
Steps to Completing Budget in PBCS:

1. Salary Roster Report (Reports)
2. Position Updates (Position Budget Forms)
3. Fringe Calculations (Other Position Types and Departmental Budget Form)
4. Intrafund Transfers (Transfers Forms)
5. Department Budget Updates (Departmental Budget Form)
Using

PBCS Workspace
Getting Started

Browser Requirement

– PBCS is compatible with Mozilla Firefox and Google Chrome.

– Do not use Internet Explorer or Safari.

– You must enable popups.

Log in to PBCS Test (Training) Site:

– [https://planning-test-a522191.pbcς.us2.oraclecloud.com/HyperionPlanning](https://planning-test-a522191.pbcς.us2.oraclecloud.com/HyperionPlanning)

– Use the [Company Sign In] button.

– Login with your UTA email and NetID password.

Note: The URL is case sensitive
PBCS Homepage:

- To begin, start on the PBCS Homepage.
- The Homepage is where you can access position data and employee data, set user preferences, and view data forms for budgeting.
Monitor the Announcements Box for updates regarding PBCS.
Setting User Preferences – First Login

- From the main page, select Tools

- Select User Preferences
Preferences – Display Preferences

- Display preferences page is used to set the Number Formatting for the data forms:
  - Thousands Separator – Select “Comma”
  - Decimal Separator – Select “Dot”
  - Negative Sign – Select “Prefix Minus”
  - Negative Color – Select “Red”
  - Page Options – Indent based on hierarchy

NOTE: Click on the Save button to save updated User Preferences.
Using PBCS Workspace

Only one position form needs to be used.
A change on any one of the forms updates all the forms.
Using PBCS Workspace

Navigation Icons

1. Search Page
2. Edit Members

Existing Positions by Department

<table>
<thead>
<tr>
<th>Years FY21</th>
<th>Scenario Budget</th>
<th>Version Working</th>
<th>Data Type Department Working Total</th>
<th>Department 320103 : 320103 - Budget, Planning and Analysis</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 1 | ![Search Icon] |
| 2 | ![Edit Icon] |

<table>
<thead>
<tr>
<th>Combo Code</th>
<th>Employee ID</th>
<th>Employee Name</th>
<th>Employee Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>100133097</td>
<td>1000393734</td>
<td>Scammell, Betty J</td>
<td>A&amp;P</td>
</tr>
</tbody>
</table>

10010220 ASSISTANT DIRECTOR BUDGET & FI 200018 OFFICE OF BUDGETS & PLANNING
1. **Search Page Icon**
   - Click on the magnifying glass icon.
   - Enter search parameter.
   - Row will be highlighted.

   **NOTE:** This function allows for text and/or numbers search only on the displayed form.
2. **Edit Members Icon (Option 1)**

- Click on the pencil icon.

- The current form Department name is displayed. Click on the arrow in the Drop-Down box.

- A list of all departments will be shown. You will only see data for areas you have security rights to.

- Select the correct department and click the **Apply** button.

- The Department name will automatically refresh.
2. Edit Members Icon (Option 2)

- Click on the pencil icon.
- The current form Department name is displayed. Click on the Member Selector icon.

- A list of departments within your approved security is displayed.
- Can search for a department using the “Search Department” box.
Using PBCS Workspace

- Click on the needed new Department or Cost Center. 
  Alternately, you can enter the Department or Cost Center in the field. 
- Click the OK button. 
- The new Department/Cost Center name is displayed highlighted yellow (changed, but NOT saved.)

- Click the GO icon. 
- The new Department name appears in white which indicates the form has been updated.
Different cell colors in a data form indicate the following:

- **White** – Data can be entered or changed.
- **Yellow** – Data entered or changed, but not saved.
- **Gray** – Read-only.
- **Comments** – Triangle in the upper-right corner of a cell.
Reports
Salary Roster

Within their security access, users can view, print, and download a salary roster report in HTML, PDF, or XLS format. There are five salary roster reports.

From the home page, click on Reports, then Salary Roster.
This report is the “working version” so changes can be viewed as they are entered.

Click on [Department 320103] to change the Department number.
Reports

• The **File Format** dropdown allows the selection of PDF, HTML, and Excel file output.

![File Format Dropdown]

• Once selected, the report will open.

• Click on the “University of Texas Arlington” logo or home icon in upper right to return to the home page.
Salary Roster for Selected Dept – Dept Users CURR VER

- This version is the current view as the Budget Office makes updates in PBCS
- This report is read only.
Salary Roster for Selected Dept – Dept Users FINAL*

• This report is the ‘final’ version which displays the final New FY XX operating budget that is loaded into UTShare. Merits have been added so data on this report represents the total salary for each position/employee.

• This report is view only.

• Updated data available in Production after budget period closes.

• Use this report to create a “planning budget” for the next FY.

NOTE: Ideally this will be done at the beginning of the FY to keep track of changes throughout the year to facilitate working on the next budget.

*This could be Final or Post Final depending on fiscal year.
Salary Roster for Selected Dept – Dept Users CY vs Prior FY

- This report compares the prior FY’s final budget (final or post final version) to the current budget year for a selected version and unit/departments; includes salary, fringe, and FTE account groups with variance columns. Note, report selection for version is new to department users. The positions listed on the report are based on the current budget year version selected.

- Located in:
Reports > Salary Roster > Salary Roster for Selected Dept – Dept Users CY vs Prior FY
Position by Version for Selected Dept

• This report lists all changes for each position by version in PBCS. It is useful if you want to historically view what type and when changes were made to a position.

• This report is view only.
Salary Roster Prior FY

• From the home page, click on Reports, then Salary Roster Prior FY.

• This report displays a report for the prior budget year, i.e. current FY if budgeting for new FY.

• This report is view only.
Position Budget Forms (within Departmental Budget)
From the home page, click the **Departmental Budget** icon; then click **Position Budget Forms** icon.
Position Budget Forms

The **Position Data** forms are used to view and edit position data in a department.

- Position data can be displayed by Department, Cost Center, or Departments by Position. *Updates to one form copies to all forms.*

- Positions are pulled into PBCS by **Funding** Department and Cost Center (which may not be the owner of the position).

- Split funded positions will show the other funding side if department is the same or by using the Departments by Position data form if the departments are different.
Budget Administrators must review and make the necessary changes to the position data forms, such as:

– Add new hires or transfers
– Change funding allocation
– Make salary changes
– Fill or Vacate a Position
– Budget Other Position Types (Part-time, Faculty, Wages, etc.)
The **Positions** forms are used to manage positions. The forms provide information such as:

- Employee Name and Employee ID
- Position Name and Number
- Position Status (Filled, Vacant)
- Employee Class and FTE
- Owning Department

Note: Changes on one form updates all forms.
Position Forms

• **Employee Classes**
  - A&P - Administrative & Professional
  - CL – Classified
  - CLN – Classified Paid Hourly
  - FA1 – Faculty (Regular/Tenure/Tenure Track
  - FA2 – Faculty Non-Tenure Track

• **FTE_Load - Full-Time Equivalency**
  - Full-time or 1 FTE – 40 hours-per-week position
  - Part-time or 0.5 FTE – 20 hours-per-week position

• **Headcount - The physical number of employees in a position**
  - 1 Headcount, 1 FTE – one person in a 40 hours-per-week position
  - 1 Headcount, 0.5 FTE – one person in one 20 hours-per-week position
  - 0 Headcount, 1 FTE – vacant position
Existing Positions by Department

Existing positions can be edited by entering new position or updating employee information.

To edit existing information, click in the appropriate cell and enter the updated information.

Form used when filling a vacant position that is already listed, updating salary, updating distribution percentage with no change to the combo code.
Position Forms

Additional Actions to Existing Position
NOTICE

Ensure the correct Department and Cost Center combo has been selected before entering any Position and Transfer amounts.
Position Funding

Position Funding Change

– If the position changes funding from one department/cost center to another department/cost center and the user has security access to both areas, then use Transfer Position.

Action Menu - Transfer Position Ruleset

- Select Position: "P10010225"
- Source Cost Center: "C315132"
- Destination Cost Center: "C315132"
- Destination Department: "320105"
- Source Department: "320105"
- Select Data Type: "Department Working Tot"

– If the department user does not have security access to make changes in both departments, the transfer process cannot be used. The Source department will need to delete the position using the Delete Position.

Action Menu - Delete Position Ruleset

- Select Position: "P10010225"
- Select Department: "320105"
- Select Cost Center: "C315132"
- Select Data Type: "Department Working Tot"

The new department will add the Position to their budget using the “New Position” forms and add the UT Share Position ID in the comments for tracking purposes.
Split-funded Positions

– Each department that partially funds a position will take responsibility for budgeting their portion of the split position.

– Each department manages only their portion and can see only their portion of the position unless they have access to both areas.

  • Using the Departments by Position data form will show the other funding departments, so that a department will know all the funding sources. (Does not show other departments monetary portion of the funding).

– No audit is in place to know whether a position is budgeted in full (100%) or has matching comp rates.

**Communication with the other department is necessary.**
Employee Transfers

If the employee transfers from one position to a vacant position within the same department or within a department that the user has security access to, use Transfer Employee (and vacate source position) action. (Employee attributes follow).

<table>
<thead>
<tr>
<th>Action Menu - Transfer Employee Ruleset</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Destination Cost Center</td>
</tr>
<tr>
<td>* Destination Department</td>
</tr>
<tr>
<td>* Source Cost Center</td>
</tr>
<tr>
<td>* Source Department</td>
</tr>
<tr>
<td>* Source Position</td>
</tr>
<tr>
<td>* Destination Position</td>
</tr>
<tr>
<td>* Select Data Type</td>
</tr>
</tbody>
</table>

If the employee transfers from one position in one department to a position in a different department that the user does not have security access to, the transfer process cannot be used. The Source department needs to vacate the position using the Vacate Position action. The Destination department needs to add to the destination position with the employee attributes.

<table>
<thead>
<tr>
<th>Action Menu - Vacate Position Ruleset</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Select Position</td>
</tr>
<tr>
<td>* Select Cost Center</td>
</tr>
<tr>
<td>* Select Department</td>
</tr>
<tr>
<td>* Select Data Type</td>
</tr>
</tbody>
</table>

Note: May need to adjust salary and distributions. Fringe will not follow the employee in this situation and will need to be evaluated.
New Positions Form

CONFIRM YOU HAVE SELECTED THE CORRECT DEPARTMENT AND COST CENTER COMBO FIRST.

Enter the first new position in the New Position 1 line.

Provide all needed information to push position to the existing Position forms:
- Employee Name and Employee ID
- Employee Class (Faculty, Classified, A&P)
- Owning Department
- Head Count and FTE
- Comp Rate and Distribution
- Coverage code and benefit plan

Add the UTShare Position ID, if it is known, as a comment for tracking purposes.

Ensure that you SAVE the updates.

The new position will appear in the Existing Positions by Department and Existing Positions by Cost Center.

NOTE: If the Combo Code does not automatically load, there is a mismatch between the department and cost center.
Other Position Types

The Other Position Types data form allows for salary budgeting not specifically associated with position IDs but as an annual total along with the proposed associated fringe amounts for part-time faculty, wages, GRA/GTA’s, etc.

- Confirm you have selected the correct Department and Cost Center combo.
- Enter the amount for the specific position type along with the fringe expense.
- The new amounts will be visible on the departmental budget forms.

Additional Fringe Adj field is for use by those departments wishing to budget for additional fringe dollars not associated to any salary specification.
Cost Centers by Department

- Shows all cost centers for department even if there are no budgeted revenue/expenses
- Summary that includes prior year actuals for cost centers within assigned department(s)
- Review listing of cost centers in department
- Located in Departmental Budget > Other Forms
Salary Reserve

Salary Reserve Accounts by CC – Dept with Unit

- This read only form shows the salary reserve data and departments can select at department/unit/All Depts levels. They can also select the fiscal year and version.

- Located in: Departmental Budget > Other Forms.

<table>
<thead>
<tr>
<th>Fund Fund</th>
<th>Function Function</th>
<th>Measures Measures</th>
<th>Department 615000 - Business</th>
<th>Years FY22</th>
<th>Version Working</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget 50100 - Faculty Salary Reserve</td>
<td>Budget 61109 - A&amp;P Salary Reserve</td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Prior FY Budget vs Dept Working Totals for CC by Dept

- Comparison of Prior Year Final budget to current year Department Working Total budget by cost center for all departments (budgeted cost centers only)
- Displays grand total for each department and suppresses cost centers with no data
- Available funding and total budgeted expense should balance to zero for each cost center
- Located in Departmental Budget > Other Forms
Class Activity

- Use the Departmental Budget > Position Budget Forms to view and update your position data
- Change Funding Source
- Add a New Position
Fringe Calculations and Rates
Fringe Calculations and Rates

Filled Budgeted Positions - Fringe amounts for filled budgeted positions are automatically updated with the employee’s current elections at the time the position data is pulled from UTShare and loaded into PBCS. Users do not have access to modify the fringe amounts for filled budgeted positions. Any changes to a position’s benefits during the budget process will cause the fringe amounts to automatically recalculate.

Employee Transfers - Fringe rates for filled budgeted positions will follow an employee who is transferred during the budget process.

Vacant Budgeted Positions - Fringe rates for vacant budgeted positions are calculated using TRS as the retirement option and a weighted average for health insurance. Users do not have access to modify the fringe rates for vacant budgeted positions.

Other Position Types - Other position types include part-time faculty, wages, graduate students, etc. Fringe rates can be manually calculated with 3% or adjusted by using the MARS Payroll Fringe Cost Analysis report or viewing the current fringe rates on the UTA Payroll webpage. Find report in MARS > Dashboard dropdown list > Payroll > Fringe Cost Analysis
Find Payroll document at https://www.uta.edu/business-affairs/payroll/

Additional Fringe Budget - Additional fringe budget can be added on the Other Position Types form in the Additional Fringe Adj cell if necessary.
### Other Position Types

<table>
<thead>
<tr>
<th>Combo Code</th>
<th>Comp Rate</th>
<th>Part-Time and Other Positions - Fringe Input</th>
<th>Salary Subtotal</th>
<th>Fringe Subtotal</th>
<th>5026 - SW Non Tenure Track</th>
<th>50210 - SW Summer Faculty</th>
<th>50403 - SW Teaching Assistant</th>
<th>51210 - SW Classified Temp</th>
<th>53201 - SW Student</th>
<th>53301 - Work Study</th>
<th>54204 - SW Research Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Fringe Adj</td>
<td>100174243</td>
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<td></td>
<td>Additional fringe adjustments can be added as a whole dollar amount.</td>
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</tr>
<tr>
<td>GRA Positions</td>
<td>100174243</td>
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<td></td>
<td></td>
<td></td>
<td>Enter comp rate and fringe as total dollar amounts.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GTA Positions</td>
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<tr>
<td>Part-Time Faculty Positions</td>
<td>100174243</td>
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<tr>
<td>Part-Time Staff Positions</td>
<td>100174243</td>
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<tr>
<td>Student Positions</td>
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<td>Summer Faculty Positions</td>
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<tr>
<td>Work Study Positions</td>
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</tbody>
</table>
Budget Transfers
To manage transfers, click on the Transfer Forms icon.

- Transfer updates are input into the **Intrafund Transfer Out – Add Transfer** form ONLY.
- The Cost Center Transfer Summary tab, Intrafund Transfer Out ZS tab, and the Intrafund Transfer In – View Transfer tab are for summary and view only.
- All transfer information needs to be entered by source department.
Transfers appear on the Departmental Budget Form
- Transfers Out reflect on 71400 GL
- Transfers In reflect on 70400 GL

Transfer Out/In Definitions
- Transfers Out refers to source Cost Center
- Transfers In refers to the destination Cost Center

Note: Review all changes on transfer forms and on departmental budget forms.

**If a department is transferring funds outside of their department, it is recommended to communicate to the Destination department.**
Departmental Budget Forms
Departmental Budget Forms

Icons and tabs read left to right.

Changes made on position and transfer forms update Departmental Budget form in real time.
The Departmental Budget Form – All KK provides revenues and expenditures for the current and prior year budgets.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>C200155 : 200155 HONORS COLLEGE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FY21</th>
<th>FY22</th>
<th>FY21</th>
<th>FY22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actuals</td>
<td>Actuals</td>
<td>Budget</td>
<td>Budget</td>
</tr>
<tr>
<td>YearTotal</td>
<td>YearTotal</td>
<td>YearTotal</td>
<td>YearTotal</td>
</tr>
<tr>
<td>Final</td>
<td>Final</td>
<td>Final</td>
<td>Post Final</td>
</tr>
<tr>
<td>Load</td>
<td>Load</td>
<td>Budget Office Adjustments</td>
<td>Budget Office Adjustments</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FY23</th>
<th>FY23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>Budget</td>
</tr>
<tr>
<td>YearTotal</td>
<td>YearTotal</td>
</tr>
<tr>
<td>Working</td>
<td>Working</td>
</tr>
<tr>
<td>Baseline Budget</td>
<td>Department Working Total</td>
</tr>
<tr>
<td>Dept Working vs BL Budget Incr (Decr)</td>
<td>Bud Office vs Dept Working Incr (Decr)</td>
</tr>
<tr>
<td>Final vs Bud Office Incr (Decr)</td>
<td>Post Final vs Final Incr (Decr)</td>
</tr>
</tbody>
</table>
Budget Administrators must review and make the necessary changes or adjustments to the **Departmental Budget Form by Cost Center**, such as:

- Verify the salary totals. If changes are required in salaries, return to appropriate form to make changes.

- Enter estimated income if applicable.

- Verify transfer totals. If changes are required, return to the transfer form to make changes if you are the source of the funds OR follow-up with appropriate department if you are the destination.

- Enter estimated expenses not tied to a specific input form, e.g. travel, M & O, etc.

**NOTE:** Your total income and expense **must** equal zero.
Department Budget Form ZS

- This form can be used to budget lump sum M&O, Travel, Scholarships and Reserve dollars at the summary “B” account level.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>Department Budget Form ZS</th>
</tr>
</thead>
<tbody>
<tr>
<td>C313255 : 313255 CIT OCI Communication</td>
<td></td>
</tr>
</tbody>
</table>

**Departmental Budget Form ZS**

<table>
<thead>
<tr>
<th>FY20</th>
<th>FY21</th>
<th>FY20</th>
<th>FY21</th>
<th>FY22</th>
<th>FY22</th>
<th>FY22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actuals</td>
<td>Actuals</td>
<td>Budget</td>
<td>Budget</td>
<td>Budget</td>
<td>Budget</td>
<td>Budget</td>
</tr>
<tr>
<td>YearTotal</td>
<td>YearTotal</td>
<td>YearTotal</td>
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<td>YearTotal</td>
<td>YearTotal</td>
</tr>
<tr>
<td>Final</td>
<td>Final</td>
<td>Post Final</td>
<td>Final</td>
<td>Working</td>
<td>Working</td>
<td>Budget</td>
</tr>
<tr>
<td>Load</td>
<td>Load</td>
<td>Budget Office Adjustments</td>
<td>Budget Office Adjustments</td>
<td>Baseline Budget</td>
<td>Department Working Total</td>
<td>Dept Working vs BL Budget Incr (Decr)</td>
</tr>
</tbody>
</table>

- **B4000 - Maintenance & Operations - Budget Input**

  - **Maintenance & Operations**
    - **B4100 - Travel - Budget Input**

  - **Travel Expense**
  - **B4300 - Scholarships & Fellowships - Budget Input**

  - **Scholarships & Fellowships**
    - **B4400 - Capital - Budget Input**

  - **Capital**
  - **Operating Expenses**

- **Total Expenses**
Departmental Budget Form ZS with GL

- This form can be used to budget M&O, Travel, Scholarships and Reserve at the GL account level.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>C312355 : 313255 OIT OCI Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY20</td>
<td>FY21</td>
</tr>
<tr>
<td>Actuals</td>
<td>Actuals</td>
</tr>
<tr>
<td>YearTotal</td>
<td>YearTotal</td>
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<tr>
<td>Final</td>
<td>Final</td>
</tr>
<tr>
<td>Load</td>
<td>Load</td>
</tr>
<tr>
<td>63003 - Office/Computer Supplies</td>
<td></td>
</tr>
<tr>
<td>63103 - Furnishings &amp; Equip Expensed</td>
<td></td>
</tr>
<tr>
<td>63141 - Computer Software Expensed</td>
<td></td>
</tr>
<tr>
<td>63142 - Computer Equip &amp; Parts Exp'd</td>
<td></td>
</tr>
<tr>
<td>63163 - Computer Equip Controlled</td>
<td></td>
</tr>
<tr>
<td>63202 - Books &amp; Ref Material</td>
<td></td>
</tr>
<tr>
<td>63632 - Telecomm Long Distance</td>
<td></td>
</tr>
<tr>
<td>63633 - Telecomm Monthly Charge</td>
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<tr>
<td>63801 - Maint Repair Buildings</td>
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<td>63822 - Maint Repair Software</td>
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<tr>
<td>63861 - Waste Disposal</td>
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<tr>
<td>64101 - Cosvino/Printine Services</td>
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</table>
Departmental Budget Form - All KK

This form is used to add a GL account that has not been used in the previous budget years.

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<tr>
<th>Departmental Budget Form - All KK</th>
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</table>

Department Budget – All KK/GL Accounts

An update on one budget form updates all forms.
Longevity

Longevity is not included in the fringe benefits calculations.

- Longevity can be budgeted on either the Departmental Budget Form ZS or Departmental Budget Form ZS with GL.
- Users need to estimate the longevity expense and enter for all cost centers.
- Departments can use UTZ_HA_VAC_SICK_LEAV_BAL_DEPT query to check longevity. – Find in HCM Reporting Tools > Query Viewer in UTShare. Criteria: CO – enter ARL, Calendar Group – enter time frame, Department ID – enter 6-digit department number.
When the Budget information is loaded back in to UTShare, it will be loaded at the B level (ex: B1000, B1100, B4000, etc.)
Class Activity

• Edit Departmental Budget Form
• Add new GL Account
In today’s class, we covered...

- Setup and basic navigation for PBCS.
- How to run a Salary Roster Report.
- How to update Position Budget Forms.
- How to update Transfer Forms.
- How to reconcile and update Departmental Budget Forms.

Here’s your budget checklist...

- Review and update position data for your Cost Center using the Existing Position by Department or Cost Center forms along with the Other Position Types and New Position Forms if applicable.
- Review and update Budget Transfers if applicable.
- Review and update the Departmental Budget form for each Cost Center. Adjust other expenses as necessary to stay within the approved baseline budget and ensure the revenue minus expense equals zero.
Contacts & Resources

For budget questions or help with PBCS, contact your budget resource representative:

<table>
<thead>
<tr>
<th>Budgets, Planning &amp; Analysis Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ginnie Cary</strong>&lt;br&gt;Email: <a href="mailto:cary@uta.edu">cary@uta.edu</a>&lt;br&gt;Phone Ext: 2-0929</td>
</tr>
<tr>
<td><strong>Barry Harris</strong>&lt;br&gt;Email: <a href="mailto:barry.harris@uta.edu">barry.harris@uta.edu</a>&lt;br&gt;Phone Ext: 2-6117</td>
</tr>
<tr>
<td><strong>Antonio Pazo</strong>&lt;br&gt;Email: <a href="mailto:Antonio.pazo@uta.edu">Antonio.pazo@uta.edu</a>&lt;br&gt;Phone Ext: 2-1846</td>
</tr>
</tbody>
</table>

Note: Refer to the Budget Resource List on the Budgets, Planning & Analysis Resources document to identify your Department’s specific Budget Resource.
Contacts & Resources

Budgets, Planning and Analysis:

- Web page: https://www.uta.edu/business-affairs/budgeting/
  - View Budget Process Calendar
  - Find a Budget Resource
  - Budget Planning Process information

Business Technology Services:

- Web page: https://www.uta.edu/business-affairs/training/
  - Register for Classes
  - Join Business Affairs Listserv
  - View and/or Print Training Materials
  - PowerPoints
  - Training Guides
  - Job Aids