

Phase I

Phase I is the process of updating, changing, and cleaning up the HR budget report in preparation for the new fiscal year. Budget submissions **are not part** of the Phase I process.

- You will need to generate the HR Budget/Expenditure Report. Please see the HR Budget Report training manual for instructions on how to generate the report.
- Save your report, this will be your working copy to be used for final submission.
- Insert a new column with the heading, “Requested Change” to the right of the “Current Budget” column.
- Drop or hide all other columns and complete the “Requested Change” column.

California State University, Fresno					
HR Budget Actuals Report					
Account Code Breakdown					
Account Code			<u>Current Budget</u>	<u>Requested Change</u>	
90000-12345-00000-601882	ABC-Academ Reg	Appt 8929-0 Lucy Lane	-		
90000-12345-00000-601882	ABC-Academ Reg	Pos # 14853 Pete Candle	-		
90000-12345-00000-601882	ABC-Academ Reg	Appt 15626-0 Pete Candle	-		
90000-12345-00000-601882	ABC-Academ Reg	Appt 19845-0 Carolyn Preston	-		


Once you have the working template, you are now ready to clean-up employee records for the Budget/Expenditure Reports:


- Delete – Terminations, Resignations, transfers out of Department
- Also delete positions if not in use

California State University, Fresno					
HR Budget Actuals Report					
Account Code Breakdown					
			<u>Current Budget</u>	<u>Requested Change</u>	
ABC-Academ Reg	Appt 8929-0 Lucy Lane		-		
ABC-Academ Reg	Pos # 14853 Pete Candle		-	Delete	
ABC-Academ Reg	Appt 15626-0 Pete Candle		-		
ABC-Academ Reg	Appt 19845-0 Carolyn Preston		-		


- Modify Chartstrings - for Fund, Department, Class, and Account

★ Departmental Changes must also be made via ETR


 California State University, Fresno HR Budget Actuals Report Account Code Breakdown					Requested Change
Account Code				Current Budget	
90000-12345-00000-601884	ABC-Part-time	Pool 911 Temporary Faculty	Allan Linkletter		
90000-12345-00000-601884	ABC-Part-time	Appt 28694-0 Susan Smith		-	Pool
90000-12345-00000-601884	ABC-Part-time	Appt 50419-0 Mary Crump		-	Pool
90000-12345-00000-601884	ABC-Part-time	Appt 16925-0 Lisa Taylor		-	Pool
90000-12345-00000-601921	ABC-Mgmt&Supv	Pos # 2622		-	Delete
90000-12345-00000-601921	ABC-Mgmt&Supv	Appt 12503-0 Jonathan Smith		-	
90000-12345-00000-601921	ABC-Mgmt&Supv	Appt 12541-0 Thomas Jefferson		-	14531 - new class

 California State University, Fresno HR Budget Actuals Report Account Code Breakdown					Requested Change
Account Code				Current Budget	
90000-12345-00000-601884	ABC-Part-time	Appt 16925-0 Lisa Taylor		-	Pool
90000-12345-00000-601921	ABC-Mgmt&Supv	Pos # 2622		-	Delete
90000-12345-00000-601921	ABC-Mgmt&Supv	Appt 12503-0 Jonathan Smith		-	
90000-12345-00000-601921	ABC-Mgmt&Supv	Appt 12541-0 Thomas Jefferson		-	Delete
90000-12345-14531-601931	ABC-Reg Staff	Pos # 3316		-	
90000-12345-14531-601931	ABC-Reg Staff	Appt 12541-0 Thomas Jefferson		-	Add
90000-12345-14531-601931	ABC-Reg Staff	Appt 13820-0 Kelly Gregory		-	
90000-12345-14531-601931	ABC-Reg Staff	Appt 14951-0 Jan Tucker		-	Add
90000-12345-14531-601931	ABC-Reg Staff	Appt 19835-0 Rick McCormick		-	
90000-12345-14531-601931	ABC-Reg Staff	Appt 15873-0 Jennifer Nelson		-	
90000-12345-14531-601931	ABC-Reg Staff	Appt 12988-0 Chris Cross		-	
90000-12345-14531-601931	ABC-Reg Staff	Pool 300 Serialized Staff		-	
90000-12345-14531-601931	ABC-Reg Staff	Pool 300 Serialized Staff	Jan Tucker	-	Delete
90000-12345-14531-601931	ABC-Reg Staff	Pool 300 Serialized Staff	Jim Clanin	-	Delete


- All pool employees will be dropped or added automatically - according to the employment end date
- Student Assistants will drop off the report automatically

		California State University, Fresno HR Budget Actuals Report						
Account Code Breakdown								
Account Code					Current Budget	Requested Change		
90000-12345-14531-601931	ABC-Reg Staff	Pool 300 Serialized Staff	Jim Clanin		-	Delete		
900000-12345-00000-60193	ABC-Shift Dif	Pool 997 Shift Differential			-			
900000-12345-00000-60193	ABC-Shift Dif	Pool 300 Serialized Staff	Jim Clanin		-			
90000-12345-00000-601961	ABC-Temp Help	Appt 17881-0 Lance Burton			-			
90000-12345-00000-601961	ABC-Temp Help	Appt 16582-0 Joy Little			-			
90000-12345-00000-601961	ABC-Temp Help	Appt 16983-0 Mike Larson			-			
90000-12345-00000-601961	ABC-Temp Help	Pool 905 Temporary Help			-			
90000-12345-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	Patty Smart		-			
90000-12345-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	Doug Sherwood		-			
90000-12345-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	John Olsen		-			
90000-12345-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	Mark Donaldson		-			
90000-12345-00000-601981	ABC-Stu Assist	Pool 906 Student Assistants			-			
90000-12345-00000-601982	ABC-Bridge SA	Pool 961 Bridge Students			-	ALL STUDENTS		
90000-12345-00000-601982	ABC-Bridge SA	Pool 961 Bridge Students	Paul Connor		-	WILL AUTOMATICALLY		
90000-12345-00000-601982	ABC-Bridge SA	Pool 961 Bridge Students	Teresa Sammons		-	FALL OFF		

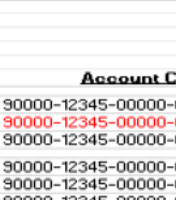
- Add all new staff:
 1. Transfers to your department
 2. New Employees to campus

		California State University, Fresno HR Budget Actuals Report						
Account Code Breakdown								
Account Code					Current Budget	Requested Change		
90000-12345-85101-601931	ABC/New-Reg Staff	Appt 18532-0 Marla Nichols			-			
90000-12345-85101-601931	ABC/New-Reg Staff	Appt 16950-0 Debbie Johnson			-	Add		
90000-12345-85102-601961	ABC/New-Temp Help	Appt 15831-0 Steven Haley			-	Add		
90000-12345-85102-601961	ABC/New-Temp Help	Appt 17873-0 Joe Parker			-	Add		

- Positions:
 1. New Positions can be added - but only if the vacant position is budgeted
 2. If you do not know the position number, a vacant position can be requested by using a job code or job classification

 California State University, Fresno HR Budget Actuals Report Account Code Breakdown					
Account Code			Current Budget	Requested Change	
90000-12345-00000-601921	ABC-Mgmt&Supv	Pos # 2628	-	Add	
90000-12345-00000-601921	ABC-Mgmt&Supv	Appt 12503-0 Jonathan Smith	-		
90000-12345-00000-601921	ABC-Mgmt&Supv	Appt 12541-0 Thomas Jefferson	-	Delete	
90000-12345-14531-601931	ABC-Reg Staff	Pos # 3316	-	Add	
90000-12345-14531-601931	ABC-Reg Staff	Appt 13820-0 Kelly Gregory	-		

- Completed Phase I

 California State University, Fresno HR Budget Actuals Report Account Code Breakdown					
Account Code			Current	Requested Change	
90000-12345-00000-60188	ABC-Academ Reg	Appt 8929-0 Lucy Lane	-		
90000-12345-00000-60188	ABC-Academ Reg	Pos # 14853 Pete Candle	-	Delete	
90000-12345-00000-60188	ABC-Academ Reg	Appt 15626-0 Pete Candle	-		
90000-12345-00000-60188	ABC-Part-time	Pool 911 Temporary Faculty Pool	-		
90000-12345-00000-60188	ABC-Part-time	Pool 911 Temporary Faculty			Sandy Lion
90000-12345-00000-60188	ABC-Part-time	Pool 911 Temporary Faculty			Gina Torres
90000-12345-00000-60188	ABC-Part-time	Appt 28694-0 Susan Smith	-	Pool	
90000-12345-00000-60188	ABC-Part-time	Appt 50419-0 Mary Crump	-	Pool	
90000-12345-00000-60188	ABC-Part-time	Appt 16925-0 Lisa Taylor	-	Pool	
90000-12345-00000-60192	ABC-Mgmt&Supv	Pos # 2622	-	Delete	
90000-12345-00000-60192	ABC-Mgmt&Supv	Appt 12541-0 Thomas Jefferson	-		
90000-12345-00000-60193	ABC-Reg Staff	Pos # 3316	-		
90000-12345-00000-60193	ABC-Reg Staff	Appt 13820-0 Kelly Gregory	-		
90000-12345-00000-60193	ABC-Reg Staff	Appt 14951-0 Jan Tucker	-	Add	
90000-12345-00000-60193	ABC-Reg Staff	Appt 19835-0 Rick McCormick	-		
90000-12345-00000-60193	ABC-Reg Staff	Pool 300 Serialized Staff	-		
90000-12345-00000-60193	ABC-Reg Staff	Pool 300 Serialized Staff	-	Delete	Jan Tucker
90000-12345-00000-60193	ABC-Reg Staff	Pool 300 Serialized Staff	-	Delete	Jim Clanin
90000-851-00000-601935	ABC-Shift Dif	Pool 997 Shift Differential	-		
90000-851-00000-601935	ABC-Shift Dif	Pool 300 Serialized Staff	-		Jim Clanin
90000-851-00000-601933	ABC-Overtime	Pool 909 Overtime	-		
90000-851-00000-601933	ABC-Overtime	Pool 300 Serialized Staff	-		Albert Edwards
90000-851-00000-601961	ABC-Temp Help	Appt 17881-0 Lance Burton	-		
90000-851-00000-601961	ABC-Temp Help	Appt 16582-0 Joy Little	-		
90000-851-00000-601961	ABC-Temp Help	Appt 16983-0 Mike Larson	-		
90000-851-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	-		
90000-851-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	-		Patty Smart
90000-851-00000-601961	ABC-Temp Help	Pool 905 Temporary Help	-		Mark Donaldson
90000-851-00000-601982	ABC-Bridge SA	Pool 961 Bridge Students	-	ALL STUDENTS	
90000-851-00000-601982	ABC-Bridge SA	Pool 961 Bridge Students	-	WILL AUTOMATICALLY	
90000-851-00000-601982	ABC-Bridge SA	Pool 961 Bridge Students	-	FALL OFF	
90000-851-85101-601931	ABC/New-Reg Staff	Appt 18532-0 Marla Nichols	-		
90000-851-85101-601931	ABC/New-Reg Staff	Appt 16950-0 Debbie Johnson	-	Add	
90000-851-85102-601961	ABC/New-Temp Help	Appt 15831-0 Steven Haley	-		
90000-851-85102-601961	ABC/New-Temp Help	Appt 17873-0 Joe Parker	-		
90000-851-85102-601981	ABC/New - Stu Assist	Pool 906 Student Assistants	-	ALL STUDENTS	
90000-851-85102-601981	ABC/New - Stu Assist	Pool 906 Student Assistants	-	WILL AUTOMATICALLY	
90000-851-85102-601981	ABC/New - Stu Assist	Pool 906 Student Assistants	-	FALL OFF	
90000-851-85102-601981	ABC/New - Stu Assist	Pool 906 Student Assistants	-		Bob Martin
90000-851-85102-601981	ABC/New - Stu Assist	Pool 906 Student Assistants	-		Richard Conrad
90000-851-85102-601981	ABC/New - Stu Assist	Pool 906 Student Assistants	-		Anne Martin

