Banner Self Service
Budget Adjustments

July, 2005
Overview

- Introduction to Banner Self Service Budget Adjustments
- Position Control vs. Budget Adjustments
- Rule Codes – Perm vs. Temp
- Guidelines/Instructions
- Using the System
- Time for You to Use the System!
- Questions
Introduction to Budget Adjustments

- Why the system is used
- How is impacts your current and base budgets
Position Control vs. Budget Adjustments

- All ‘permanent’ budget changes that impact permanent positions (E&G and AE) must be done via the position maintenance form (PMF) found on the budget office website, http://budget.gmu.edu.

- Temporary budget changes that impact permanent positions (E&G and AE) are allowed.

- This process is not used for Sponsored Program or Capital funds.
Available rule codes:

Permanent – XEGP, XAEP, XIDR

Account Codes:
61120, 61190, 61400, 61610, 70000

Temporary – XEGT, XAET

Account Codes:
Above, plus 61110, 61220, 61310

Transfers to/from fringe (61900) is not allowed.
All transfers must have an offset (system will not allow unbalanced entries).

You may choose to complete “Single” (a two sided entry) or “Multiple” (five line) budget adjustments.

Full FOAP required.

Always use your initials at the beginning of the entry description.
Using the System

Example
Time for you to use the System

- Log-in and complete an adjustment using either a permanent and temporary rule code. (Reference the training document beginning on page 6.)

- View your transaction.
Questions

If clarification is needed, contact either:
Barbara Maddox, 3-8752, or your Budget Analyst