

The slide features several decorative circles. At the top, there are three circles: a white circle with a light purple outline, a solid light purple circle, and another solid light purple circle. Below the text, there are three more circles: two solid light purple circles on the left and one white circle with a light purple outline on the right.

# 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 it 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.

# Rule Codes – Perm vs Temp

- Available rule codes:

Permanent – XEGP, XAEP, XIDR

Account Codes:

61120, 61190, 61400, 61610, 70000

Temporary – XEGT, XAET

Account Codes:

Above, plus 61110, 61220, 61310

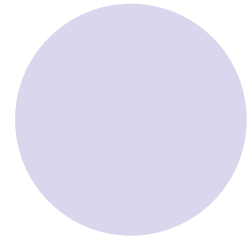
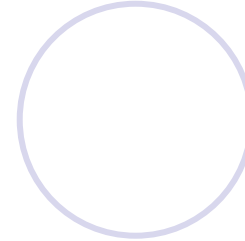
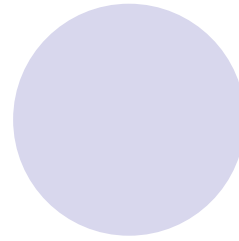
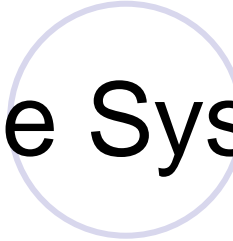
Transfers to/from fringe (61900) is not allowed.



# Guidelines/Instruction

- 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:  
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your Budget Analyst