

GENERAL INSTRUCTIONS

The budget for each department or project should be amended to reflect the current estimate of expenditures and income (if applicable) for the fiscal year. Personnel reports and budget amendment forms should be submitted as early as possible to avoid delays in processing payroll checks. The home base department should be the focal point for coordinating an amendment and personnel report regardless of the source of funding. Some of the transactions that require a budget amendment form, personnel report, or both are outlined below.

TRANSACTIONS REQUIRING ONLY A PERSONNEL REPORT

- (1) Change in Position Job Title and/or Job Classification Code for Non-Faculty Positions
- (2) Change of Name
- (3) Correction of Social Security Number
- (4) Change in Incumbent's degree
- (5) All line item employees not fully funded in the FY 2012 Original Budget
- (6) Set up payroll and personnel data for graduate assistants and other personnel paid from either a monthly or hourly lump sum position.

TRANSACTIONS REQUIRING ONLY AN AMENDMENT FORM

- (1) Establish a budget amount or change the amount budgeted for non-personal services expenditures, e.g., travel, operating supplies and expense, equipment, holdback, indirect overhead, etc.
- (2) Establish a budget amount or change the amount budgeted for anticipated income for the fiscal year.
- (3) Establish or change the amount budgeted for a vacant position.
- (4) Establish a budget amount or change the amount budgeted for personal services lump sum positions. Lump sum positions include Clerical and Technical - Regular (LBCLR), Clerical and Technical - Students (STUWK), Summer School Faculty (SS FA), Part-Time Faculty (PTFAC), Post Doctoral Assistants (PST D), Extra Compensation (SPPAY), Graduate Assistants (see Appendix "E" for position abbreviations), Staff Benefits (STFBE), and special lump sum positions established for payment of accrued leave. Use the following rates per 1.00 EFT in budgeting lump sum positions in the FY 2012 budget:

Lump Sum Position	Budget Rate Per 1.000 EFT
Summer Faculty	97,669
Part Time Faculty	98,146
Post Doctoral Associates	40,895
Graduate Assistants - Doctoral Level	46,062
Graduate Assistants - Masters Level	42,616
Clerical & Technical - Regular, Lump Sum	23,589
Clerical & Technical - Student, Lump Sum	18,824

TRANSACTIONS REQUIRING BOTH AN AMENDMENT AND PERSONNEL REPORT

- (1) Change in annual rate and the amount budgeted for personnel occupying a line item position.
- (2) Employee changing from one position to another.
- (3) Change in the amount budgeted for any portion of a position (a redistribution of the breakdown of the amount budgeted for the activities within the position).
- (4) Terminating employee from a line item position.
- (5) Leave without pay resulting in a decrease in the total annual amount budgeted. Monthly positions require an amendment and personnel report for any amount of leave without pay. Salaried bi-weekly positions should be amended if and when the leave without pay is equal to at least three days pay.
- (6) Change or correction in contract category in faculty positions (change from academic year to fiscal year or from fiscal year to academic year).
- (7) Change from salaried bi-weekly position to monthly position.
- (8) Change or correction in position short title.