

## **FY-2010 BUDGET SPECIFICATION (STAGE II)**

### **SALARY BUDGET SPECIFICATION FORMS INSTRUCTIONS - CHARLES RIVER CAMPUS**

**Consistent with the FY-2009 Salary Budget Specification Process, all base salary and stipends (e.g., stipends paid to the chair's of academic departments), if any, should be budgeted in the employee's primary position. Salary dollars should not be budgeted in secondary stipend positions. All academic appointment information continues to be extracted from the Faculty Appointment (ALFA) system and is listed just below the accounting distributions.**

The forms are provided for each department with funds currently budgeted for full-time and/or part-time faculty and/or staff included in the definition of object codes 0900, 0901, 0903, 0904, 0905, 0906, 0907, and 0909. These forms are preprinted with budget, position, and job information extracted from the Position Administration and Salary System (PASS) as of February 25, 2009. The employee fields and faculty fields were converted from existing data in the payroll (MSA) and Faculty Appointment (ALFA) systems, respectively. FY-2009 salaries and budgets have been annualized for FY-2010.

For a large majority of the employees listed on the enclosed forms, you need only review the preprinted data for accuracy. Any changes to the "projected" amounts are to be noted in the "revised" column, along with an explanation and effective date of the change. **The FIRST page of the report is to be initialed to confirm that you have reviewed the data and are confirming that it is, to the best of your knowledge, correct for establishing the FY-2010 Budget.**

All amounts budgeted in the non-student payroll object codes (Object Codes 0900 through 0909 excluding 0902 and 0908) need to be budgeted and assigned to a position, whether it is to an individual position, a reserve position, or a group position.

## Types of Positions

- Individual Positions

The most common position type is the Individual Position. This type of position normally has a single incumbent.

- Group Positions

A second type of position is the Group Position (position number begins with "G"). This type of position is established with the expectation that multiple part-time faculty will hold the same position at the same time. Generally, these employees are paid on a per course, student, credit hour, etc. basis and are employment-code "FZ". Also included are teaching overbase payments to regular full-time faculty. **For FY-2010 Stage II processing, please provide an estimated overall group position FTE, to the extent that is now known.** Note that in addition to Group positions, Individual positions may exist for Object Code 0901 with data that is to be reviewed and updated for FY-2010.

- Reserve Positions

Finally, there are Reserve Positions (position number begins with "R") which are used to hold budgeted funds but will never have an incumbent. Examples of this would include a departmental Casual Employees budget reserve (note that Casual Employees will not be processed through nor maintained on PASS, although the funding for casual employees needs to be identified and budgeted in PASS). The preprinted FY-2010 Budget Specification Forms include reserve positions which existed last year and have been set up with the respective budget amounts that existed on February 26, 2009. To establish new positions and budget reserve funds, complete the blank forms for additional personnel/positions provided in the completed sample package.

## **FY-2010 DATA UPDATES - BUDGET VERSUS OTHER CHANGES**

It is important to remember that data recorded on the FY-2010 Salary Budget Specification Forms will not automatically change academic appointment, position, or payroll information. The changes provided on the FY-2010 Salary Budget Specification Forms will be used to record updates to budgets and provide information pertaining to anticipated changes to related data. **To effect non-budget changes you must process the appropriate appointment papers, position description forms, and/or payroll turnaround forms.** Please advise us about expected changes to FY-2010 data by writing updates on the FY-2010 Salary Budget Specification Forms and an explanation along with the expected effective date of change in the "Comments" section. For changes to the "Projected" amount(s), please complete the appropriate "Revised" column(s).

## LINE BY LINE INSTRUCTIONS - INDIVIDUAL POSITIONS

NOTE: The detailed instructions that follow pertain to data fields for Individual Positions. All Individual positions must be realistically budgeted. **Individual Positions which are insufficiently funded will be eliminated.**

For Group Positions please provide an estimated overall group position FTE, to the extent that is now known. Not all the fields listed are required for Reserve Positions. For Reserve positions, please refer to the completed sample forms which show which fields are needed for completion of the FY-2010 Salary Budget Specification Forms.

### FY-2010 Salary Budget Specification Form: Employee Information (lines 1 & 2)

For filled positions, these fields provide information about the employee.

**1a.) Name**

**1b.) Employee ID Number**

**1c.) Base Assignment Duration**

This is the standard assignment duration used in calculating the base salary (see 1d, below). For faculty, it will be either 9 or 12 months and for non-faculty it will be 12 months. Note that this is not necessarily the employee's assignment duration. It is the standard used in calculating a base salary for comparative purposes only.

**1d.) Base Salary**

This is the rate paid to an employee for his or her regular responsibilities. It excludes overbase payments and faculty stipends. Base salary is calculated using the Actual Annual Amount paid to the employee, adjusted to 100% time and a standard assignment duration (either 9.0 or 12.0 Months). See example at line 7b.

**FY-2010 Salary Budget Specification Form: Employee Information (lines 1 & 2)**  
**(continued)**

**1e.) Review**

This identifies the salary review process and unit-dept. where the employee will be listed.

**2a.) Position Status Code**

(e.g., "Active", "Eliminated")

**2b.) Hire Date**

**FY-2010 Salary Budget Specification Form: Position Information - (lines 3 through 8)**

These fields provide data about the position relating to the employee in this position. An employee's Primary Position data is listed. Academic appointments, if any, are listed below the accounting distributions. All base pay salary and budget data has been assigned to the primary position.

**3a.) & 3b.) Position Number and Version**

Each position in PASS has a unique, randomly generated, six-character Position Number. The number of positions at the University will remain relatively constant, changing only when positions are created or eliminated. When the attributes that describe a job change, the Position Number remains the same, but a new version is created, with a sequential four-character Version Number.

For example, if a job description is rewritten, upgrading a position from secretary to administrative assistant, the Position Number remains the same, but a new version (and Version Number) is generated. Even if a job changes from hourly to monthly, from exempt to non-exempt, or from represented to non-represented, the Position Number remains the same.

**FY-2010 Salary Budget Specification Form: Position Information - (lines 3 through 8)**  
**(continued)**

**3a.) & 3b.) Position Number and Version (continued)**

The Human Resources and Budget Offices will maintain assignment of a new Version Number. The Position Number plus the Version Number uniquely identify a job, and the current attributes can be determined by the dates of the current version(s).

**3c.) Funding Indicator**

(e.g., Fully Funded, Funding Pending, Funding Not Required, Funding from Other Department, and No Funding Due To LOA) -- YOU NEED NOT UPDATE THIS FOR FY-2010, THE BUDGET OFFICE WILL UPDATE THIS FOR FY-2010 AS NEEDED.

**3d.) Employee-Position Assignment Duration**

**3e.) Position Assignment Duration Start Month and Day**

**3f.) Position Representation Status**

(e.g., NREP (non-represented))

**3g.) Normal Hours**

For hourly paid employees

**4a.) Position Title**

**4b.) Employee-Position % Time**

This is the current percent time for the employee holding the position and changes when the employee temporarily changes his or her percent time. This is different from the "Standard Position % Time" (see line 5b), which is the normal percent time for the position.

**4c.) Search Status**

Indicates whether or not a search is underway to fill the position. Codes include: No, Posted, and Offered. YOU NEED NOT UPDATE THIS FIELD. For report purposes, the posting amount will print for a posted position.

**FY-2010 Salary Budget Specification Form: Position Information - (lines 3 through 8)**  
**(continued)**

**4d.) Salary Grade**

Blanks are not allowed in this field, therefore all positions have been assigned a numerical value for this field, either the traditional salary grade values or values indicating why the position is exempt from the traditional salary grades -- e.g., faculty positions will have a "05" in this field.

**4e.) Hourly Rate**

For hourly paid employees.

**5a.) Standard Position Assignment Duration**

This is the normal assignment duration for the position.

**5b.) Standard Position % Time**

This is the normal percent time for the position. Note that for Reserve Positions the percent time is not applicable.

For example, a position is defined as 100% time. When the employee holding this position temporarily reduces to 75% time for 3 months, this field will continue to reflect 100% time, but the "Employee-Position % Time" (see line 4b) will reflect the temporary 75% reduced time.

**6.) Home-Base Fund-Unit-Department-Object**

**7a.) Accounting Distributions**

**7b.) Projected Actual Annual Amount**

This is the amount, based on the current standard actual annual amount that is projected for the next fiscal year.

Actual Annual Amount is the amount that will be paid to the employee in this position, in a normal year at the employee's current percent time, assignment duration, and rate of pay. It is not necessarily the amount paid or to be paid in the current year. This differs from the more traditional base amount in that Actual Annual Amount is not normalized to a standard number of months or to 100% time.

**FY-2010 Salary Budget Specification Form: Position Information - (lines 3 through 8)**  
**(continued)**

**7b.) Projected Actual Annual Amount (continued)**

The employee-position Actual Annual Amount is effectively the current rate of pay per pay period multiplied by the number of pay periods in a fiscal year for this position.

Example: An employee earning \$48,000 per year for a 12-month position at 90% time receives a salary increase to \$50,000 effective January 1.

The employee-position Actual Annual Amount is \$50,000 (projected 12 months at the new rate of \$4,166.67 per month), since the employee holds the position as it is normally set up and budgeted.

The Incumbent Commitment Amount (line 7d) is \$49,000 (6 months at \$4,000 per month and 6 months at \$4,166.67 per month).

Assuming that this is the only base position held by the employee, the 12-Month Base Salary (line 1d) is \$55,556 (the \$50,000 90% rate "normalized" to 100%).

**7c.) Revised Actual Annual Amount**

Record FY-2010 Stage II changes here.

**7d.) Projected Incumbent Commitment Amount**

This is the amount to be paid to this incumbent for the entire current fiscal year. It differs from Actual Annual Amount in that Incumbent Commitment Amount does not reflect the annualization of mid-year salary increases or mid-year hires. (See example at line 7b).

**7e.) Revised Incumbent Commitment Amount**

Record FY-2010 Stage II changes here.

**7f.) Projected Budget Amount**

This is the amount budgeted for this position from this distribution. Note that it is not required to reduce the budgeted funds from a position when the Incumbent Commitment Amount is reduced. Surplus funds can be maintained in the position.

**FY-2010 Salary Budget Specification Form: Position Information - (lines 3 through 8)**  
**(continued)**

**7g.) Revised Budget Amount**

Record FY-2010 Stage II changes here.

**7h.) Comments**

For expected change explanation(s) and effective date(s).

**8.) Totals**

**9.) Academic Appointment Information**

This is data extracted from the Provost Office's Faculty Appointment (ALFA) system.

**FY-2010 Salary Budget Specification Form: Unit-Department-Object Totals**

Provides totals for each unrestricted unit-department-object. The preprinted total should be updated for corrections you have made, including any additional positions you have identified. This unit-department-object total must match the budgeted amount you submit for the respective unit-department-object codes in your FY-2010 budget.