

Instructions

NBAPBUD Permanent Base/Future Year Position

Budget Revision (BD02)

NBAPBUD Form BD02 is used to request a permanent base budget revision for a single position. Funds moved between Index/FOAPALS and accounts using a BD02 will be permanent changes and remain in effect on future year budgets. Because Banner automatically posts BD02 entries in both Current and Base, please process an additional BD04 entry to reverse the current entry, if needed. A budget revision that needs to be for the current fiscal year only (a temporary move) should be made on Temporary Current Year Position Budget Revision (BD04). Position Form BD04 and instructions can be found using this link to the [Office of Financial Planning Budget Revision web page](#).

Before starting NBAPBUD Form BD02, the requestor will need to know the FOAPAL where funds need to be moved to, removed from, and the dollar amount. In addition, the requestor should know the current position budget, the new or proposed position budget, and the current distribution (labor %) of the FOAPAL for the position budget. The FOAPAL contains the Fund, Org, Account Code, Program, Activity and Location numbers. Location is not used when creating budget revisions. Finally, the requestor should know the employee's name, UUID, and position number, the reason for the revision, and the date the salary difference is effective.

Form Instructions:

- UserID: Requires the preparer's University UserID. The userid is the same as the e-mail address (without @memphis.edu). It is used to logon to most University systems.
- User Name: Auto-populates based on the userID entered.
- Department: Auto-populates based on the userID entered.
- Fiscal Year: Type in the four digit fiscal year (ex: 2013) for the budget revision. The University of Memphis has a fiscal year of July 1 to June 30. The budget revision will usually be in the current fiscal year. This is the year that the June 30 date falls. For example, fiscal year 2013 is July 1, 2012 – June 30, 2013. Occasionally, a budget revision can take place outside of the current fiscal year. This usually occurs when a revision is needed immediately after the fiscal year has ended.

- Date: Auto-populates with the current date.
- Index: Type in the six-digit Index associated with the FOAPAL needed. This field is a numeric field. Do not enter any other text such as hyphens. Entering the Index will auto-populate the rest of the FOAPAL string (**excluding the Account Code**). If there is not an Index created for the FOAPAL string, each part of the FOAPAL will need to be entered separately. To search for an Index, click on this link <http://bf.memphis.edu/spectrum/> to reach the Finance Program Guide.
- Org or Index Title: If the Index is used, this field will auto-populate. If there is no Index, enter the Org title in the Org or Index Title field. The Finance Program Guide <http://bf.memphis.edu/spectrum/> can assist in finding the correct Org title.
- Fund: If the Index is used, this field will auto-populate. If there is no Index, enter the six-digit Fund. The Finance Program Guide <http://bf.memphis.edu/spectrum/> can assist in finding the correct Fund. A Fund is required to process the budget revision.
- Org: If the Index is used, this field will auto-populate. If there is no Index, enter the six-digit Org. The Finance Program Guide <http://bf.memphis.edu/spectrum/> can assist in finding the correct Org. An Org is required to process the budget revision.
- Account Code: **An Account Code will be needed even if an Index is used.** The requestor needs to be familiar with the University of Memphis account codes; especially as they pertain to the budget pools. The Finance Program Guide <http://bf.memphis.edu/spectrum/> can assist in finding the correct Account Code. An Account Code is required to process the budget revision.
- Program: If the Index is used, this field will auto-populate. If there is no Index, enter the four-digit Program. The Finance Program Guide <http://bf.memphis.edu/spectrum/> can assist in finding the correct Program. A Program is required to process the budget revision.
- Activity: If the Index is used, this field will auto-populate. If there is no Index, enter the Activity. There are FOAPALS that do not have an Activity. This field is not required to process the budget revision. However; the requestor needs to be aware if an Activity Code is needed. The Finance Program

Guide <http://bf.memphis.edu/spectrum/> can assist in finding the correct Activity.

- Current Dist %: Enter the labor distribution percentage for the FOAPAL on the position budget (refer to Banner form NBAPBUD Labor Distribution).
- Proposed Dist %: Enter the new labor distribution percentage for the FOAPAL on the position budget (refer to Banner form NBAPBUD Labor Distribution). If this amount will not change, enter the same percentage as Current Dist.
- Existing Budget: Enter the current position budget in Banner form NBAPBUD.
- Proposed Budget: Enter the new budget amount for the position.
- Budget Amount: There are four Budget Amount fields for each row on the budget revision form. The first two are to increase (+) or decrease (-) the expense account codes and the second two are to decrease (-) or increase (+) the revenue account codes. Do not use negative numbers in the Budget Amount fields.
- Position Number
Employee Name: Enter the position number for the position that needs to be adjusted and the last name of the employee.
- Net Change: This field auto-calculates and should net to zero. This indicates that the entry is balanced.
- Document Total: This field auto-calculates the totals of all of the entries. It is used by Financial Planning when entering in Banner.
- Reason: A **detailed** justification for the budget revision needs to be typed in this box.

When the form is completed, it should be printed out and the proper approval signatures obtained. Information on the approval process can be found on the [Office of Financial Planning Budget Revision web page](#). The form should be submitted on one page in a portrait orientation.

If there are any problems using the form, please contact the Office of Financial Planning at extension 2117.