



# **Texas Tech Health**

## **EL PASO**

### Budget Prep User Guide

Budget Office

# Budget Prep User Guide

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## Outline / Table of Contents

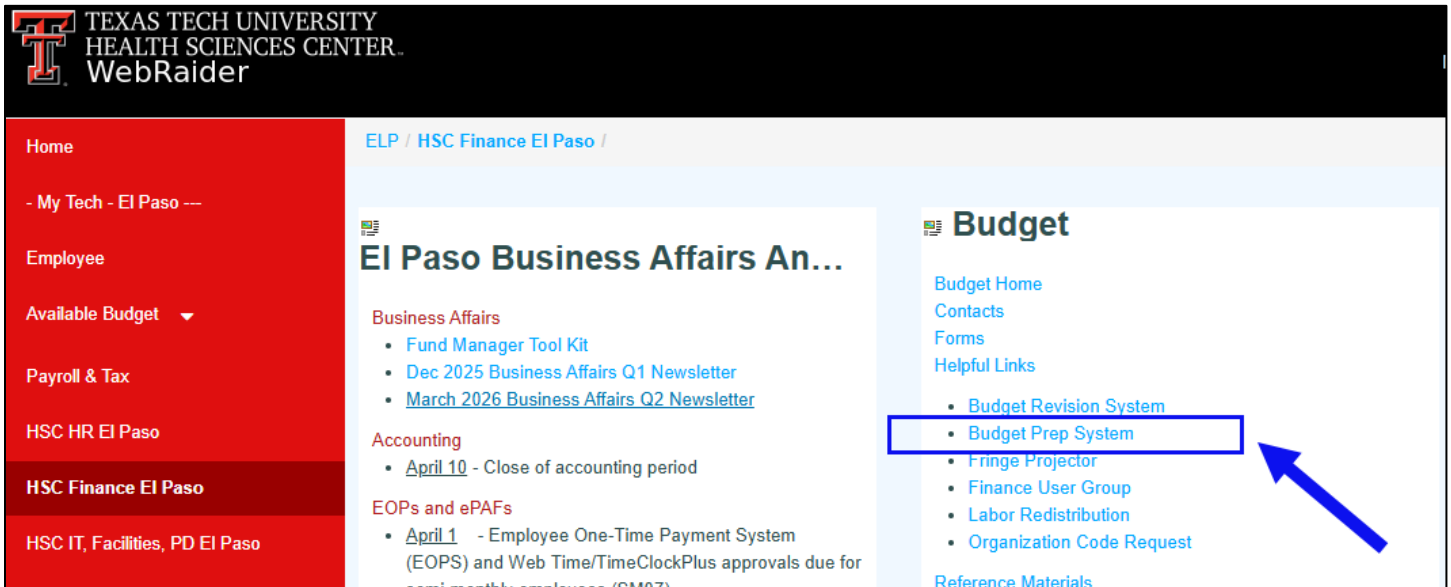
1. Accessing Budget Prep System .....	2
2. Salary Planner	
- Updating Labor Distribution .....	3
- Entering Merits .....	13
3. Budget Development .....	21
- Worksheet Query .....	22
- Updating Worksheets .....	25
- Adding Budget Lines .....	27
- Comments & History .....	28

## BUDGET PREP USER GUIDE

This user guide will outline the steps to update Labor Distribution and enter merits in Salary Planner and how to make updates to Worksheets in Budget Development.

### ACCESSING BUDGET PREP SYSTEM

From the WebRaider Portal – HSC Finance El Paso tab, click on Budget Prep System under the Budget section.



The screenshot shows the WebRaider portal interface. On the left is a red navigation sidebar with the following items: Home, - My Tech - El Paso ---, Employee, Available Budget (with a dropdown arrow), Payroll & Tax, HSC HR El Paso, HSC Finance El Paso (highlighted in a darker red), and HSC IT, Facilities, PD El Paso. The main content area has a breadcrumb trail: ELP / HSC Finance El Paso / . Below this is a section titled "El Paso Business Affairs An..." with sub-sections: Business Affairs (containing links for Fund Manager Tool Kit, Dec 2025 Business Affairs Q1 Newsletter, and March 2026 Business Affairs Q2 Newsletter), Accounting (containing a link for April 10 - Close of accounting period), and EOPs and ePAFs (containing a link for April 1 - Employee One-Time Payment System (EOPS) and Web Time/TimeClockPlus approvals due for semi-monthly employees (SM07)). On the right side of the main content area is a "Budget" section with links for Budget Home, Contacts, Forms, and Helpful Links. Under the Helpful Links, there is a list: Budget Revision System, Budget Prep System (highlighted with a blue box and a blue arrow pointing to it), Fringe Projector, Finance User Group, Labor Redistribution, and Organization Code Request. At the bottom of the Budget section is a link for Reference Materials.

## Updating Labor Distribution in Salary Planner

Departments can enter changes to position labor distributions in Salary Planner.

### ACCESSING SALARY PLANNER

From the Budget Prep menu, click HSC-EI Paso Salary Planner.

My Finance • Budget Prep Menu

Budget Prep Menu

<b>Budget Development Quick Update</b> FOP selection for Quick Update	<b>Query Budget Development</b> Query Budget Development data for a specified phase and FOP
<b>Update Budget Development</b> Update Budget Development data for a specified phase and FOP	<b>Lock Budget Development</b> Lock or unlock update to Budget Development and Budget Transfers
<b>Update Budget Transfers</b> Update Transfers In and Transfers Out for a specified phase and FOP.	<b>Budget Prep Security (TEAM)</b> Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.
<b>TTU/TTUS Salary Planner Menu</b> Salary Planner	<b>HSC Salary Planner Menu</b> Salary Planner
<b>HSC-EI Paso Salary Planner Menu</b> Salary Planner	<b>Budget Prep Reports</b> View Budget Development and Salary Planner reports.

### SELECTING SCENARIO

From the Salary Planner menu, click on “Edit Scenario”.

Employee Dashboard • Salary Planner

Salary Planner

<b>Edit Scenario</b> Allows Salary Planner users to edit existing scenarios.	<b>Copy Scenario</b> Allows Salary Planner users to copy data from one scenario to another.
<b>Organization Lock</b> Allows Salary Planner users to check the lock status of an organization.	<b>Query Multiple Extracts</b> Allows Salary Planner users to select multiple Budget Extract IDs for combined viewing.
<b>Finance Budget Development</b> Allows access to the Finance Budget Development module in Finance Self-Service.	

On the Edit Scenario screen, you will be required to make a Scenario Selection. Use the dropdown list to select the “Extract ID” for the current Budget Prep cycle.

The Extract ID and Scenario change each year. (As an example, for Budget Prep Fiscal Year 27 the Extract ID is El Paso HSC FY2027 Extract and Scenario is E27SAL.)

Employee Dashboard • Salary Planner • Edit Scenario

### Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

#### Scenario Selection

Extract ID: El Paso HSC 2017 Other ← Select Extract ID for current Budget Prep Cycle

Scenario: E170TH

#### Filter Criteria

By Position Attributes  By Employee Name

Select

[Copy Scenario](#) • [Organization Lock](#) • [Query Multiple Extracts](#)

The corresponding Scenario will populate automatically after selecting the Extract ID.

Employee Dashboard • Salary Planner • Edit Scenario

### Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

#### Scenario Selection

Extract ID: El Paso HSC FY2027 Extract

Scenario: E27SAL ← Scenario will populate automatically after Extract ID is selected

#### Filter Criteria

By Position Attributes  By Employee Name

Select

[Copy Scenario](#) • [Organization Lock](#) • [Query Multiple Extracts](#)

## SELECTING FILTER CRITERIA

Under the Filter Criteria section, you can search multiple positions by choosing the “By Position Attributes” option or search a single employee using the “By Employee Name” option.

To update labor distributions, select “By Position Attributes” and click “select” to continue to the next screen.

The screenshot shows the 'Edit Scenario' interface. At the top, there are breadcrumb links: 'Employee Dashboard' > 'Salary Planner' > 'Edit Scenario'. Below this is the title 'Edit Scenario' and a message: 'Choose Extract ID and Scenario, then select filter criteria.' The 'Scenario Selection' section contains two dropdown menus: 'Extract ID' (set to 'El Paso HSC FY2027 Extract') and 'Scenario' (set to 'E27SAL'). Below these is the 'Filter Criteria' section with two radio buttons: 'By Position Attributes' (selected) and 'By Employee Name'. A red 'Select' button is positioned below the radio buttons. At the bottom, there are three links: 'Copy Scenario', 'Organization Lock', and 'Query Multiple Extracts'. Blue callout boxes with arrows point to the 'By Position Attributes' radio button (labeled 'To search multiple positions'), the 'By Employee Name' radio button (labeled 'To search by single employee'), and the 'Select' button.

## SEARCHING POSITIONS

The Position Filters screen will allow you to narrow down search results. The Organization will default to “All”.

The screenshot shows the 'Position Filters' interface. At the top, there are breadcrumb links: 'Employee Dashboard' > 'Salary Planner' > 'Position Filters'. Below this is the title 'Position Filters' and a message: 'Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.' The 'Update of Budget Development' section contains three fields: 'Chart of Account:' (E), 'Budget ID:' (E2027), and 'Budget Phase:' (E27DPT). Below these is the text 'E2027, E27SAL'. The 'Organization:' field is a dropdown menu with 'All' selected. A red 'X' is visible in the dropdown. Below the dropdown is the 'Include Subordinate Organizations:' checkbox, which is checked. A blue callout box with an arrow points to the 'All' selection in the dropdown menu, containing the text: 'Keep "All" or enter organization number.'

Keep “All” in the Organization filter to view all results based on your Budget Prep security or remove the “All” filter and enter the number of the organization you would like to query.

Click the List By Position button to query positions in the organization. The list will include filled and vacant positions.

Employee Dashboard • Salary Planner • Position Filters

### Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

#### Update of Budget Development

Chart of Account: E  
Budget ID: E2027  
Budget Phase: E27DPT  
E2027, E27SAL

Organization:  ← Results will populate for this Organization only.

Include Subordinate Organizations:

Employee Class:

Include Pooled Positions:

Include Vacant Positions:

Employee Filter

## LIST BY POSITION

The List By Position screen will display a list of the positions under an organization. The list includes the Position and Title, FTE and salary information, and a column labeled "Links" on the far right.

Click on the "Distribution" link that corresponds to the position that you need to update.

Employee Dashboard • Salary Planner • List By Position

### List By Position

Update of Budget Development

Chart of Account: E  
Budget ID: E2027  
Budget Phase: E27DPT  
[Jump To Bottom](#)

533712 - Department Org, Unlocked

Position and Title	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit:	Estimated Fiscal Year Budget	Links	Exact Status	Exclude from Totals
E89288 Assistant Professor-NTT	1.00	<input type="text" value="1.0000"/>	150,000.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	150,000.00		150,000.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
E99319 Advanced Practice Provider	1.00	<input type="text" value="1.0000"/>	110,000.00	<input type="text" value="2.00"/>	<input type="text" value="2,200.00"/>	112,200.00		112,200.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
E99604 Clinical Research Coor	0.50	<input type="text" value="0.5000"/>	28,000.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	28,000.00		28,000.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
Total	2.50	2.50	288,000.00	0.76	2,200.00	290,200.00		290,200.00			

[Jump To Bottom](#)

Click "Distribution" to update labor distribution

The Position Distribution screen displays three sections with distribution information: Current, Proposed, and Proposed Job Distribution.

Labor distribution changes are entered under the "Proposed Section".

Click on the Percent hyperlink to modify the existing distribution line.

Employee Dashboard • Salary Planner • Position Distribution

**Position Distribution**

Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

### Update of Budget Development

Chart of Account: E  
Budget ID: E2027  
Budget Phase: E27DPT  
Budget Distribution for Position E99319 Advanced Practice Provider

**Current**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
E		183199	533712	612005	35					100.00	110,000.00
Total										100.00	110,000.00

**Proposed** ←

Click to edit.

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
E		183199	533712	612005	35					100.00	112,200.00
Total										100.00	112,200.00

Add a new record

Proposed Job Distribution

The Account Distribution window will display the different labor distribution elements.

Update the existing labor distribution information and click the Save button to save your changes. Or if that labor distribution line is no longer needed, click the Remove button at the bottom.

Employee Dashboard • Salary Planner • Account Distribution

### Account Distribution

Add or change an Account Distribution component and select Save. You may choose an Account Distribution component button to query values.

#### Budget Distribution for Position E99319 [Advanced Practice Provider]

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COA: E

Default from Index

Index:

Fund:

Organization:

Account:

Program:

Activity:

Location:

Project:

Cost Type:

Percent:

Amount:

Position Distribution

To add a new labor distribution line, click on the "Add a new record" hyperlink under the Proposed section.

Employee Dashboard • Salary Planner • Position Distribution

Position Distribution

Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

**Update of Budget Development**

Chart of Account: E  
Budget ID: E2027  
Budget Phase: E27DPT  
Budget Distribution for Position E99319 Advanced Practice Provider

**Current**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
E		183199	533712	612005	35					100.00	110,000.00
Total										100.00	110,000.00

**Proposed**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
E		183199	533712	612005	35					50.00	56,100.00
Total										50.00	56,100.00

[Add a new record](#)

Your changes were applied successfully.

Proposed Position Budget Distribution percent does not total 100.

Total must equal 100.

For single positions, the Proposed Position Distribution must match the Proposed Job Distribution for an incumbent. After the necessary labor distribution changes have been entered in the “Proposed” section and the Percent total equals "100", click the “Copy Position Distribution to Jobs” button.

Employee Dashboard • Salary Planner • Position Distribution ✔ Your changes were applied successfully.

**Proposed**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
E		183199	533712	612005	35					50.00	56,100.00
E		183208	533712	612005	35					50.00	56,100.00
Total										100.00	112,200.00

Add a new record

**Proposed Job Distribution**

**Current Incumbent**

Name and ID: Carol Sturka R02008043

Position-Suffix and Title: E99319-00 Advanced Practice Provider

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Encumbrance Override End Date
E		183199	533712	612005	35					100.00	112,200.00	
Total										100.00	112,200.00	

Copy Position Distribution to Jobs

Click to align distributions

List By Employee • List By Position • Summary Totals

This will apply the Proposed Position Distribution to the employee's Proposed Job Distribution record.

The "Copy Position Distribution to Jobs" option will not be necessary for vacant positions as there will not be a Current Incumbent.

***IMPORTANT: If a labor distribution change is initiated on the Job Detail screen instead of the List By Position screen, the changes will need to be entered again via the List By Position to apply the changes to the Proposed Position Distribution.***

To return to your list of positions click on the "List By Position" link at the bottom of the screen. Or close the screen to exit.

Employee Dashboard • Salary Planner • Position Distribution

✔ Your changes were applied successfully.

**Proposed**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	
E		183199	533712	612005	35					50.00	56,100.00	
E		183208	533712	612005	35					50.00	56,100.00	
										Total	100.00	112,200.00

**Proposed Job Distribution**

**Current Incumbent**

Name and ID: Carol Sturka R02008043

Position-Suffix and Title: E99319-00 Advanced Practice Provider

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Encumbrance Override End Date	
E		183199	533712	612005	35					50.00	56,100.00		
E		183208	533712	612005	35					50.00	56,100.00		
										Total	100.00	112,200.00	

Copy Position Distribution to Jobs

Proposed distribution must match Proposed Job Distribution.

## Entering Merits in Salary Planner

If merits are approved for the Budget Prep cycle, departments will enter merits in Salary Planner.

### ACCESSING SALARY PLANNER

From the Budget Prep menu, click HSC-El Paso Salary Planner.

My.Finance • Budget Prep Menu

Budget Prep Menu

<b>Budget Development Quick Update</b> FOP selection for Quick Update	<b>Query Budget Development</b> Query Budget Development data for a specified phase and FOP
<b>Update Budget Development</b> Update Budget Development data for a specified phase and FOP	<b>Lock Budget Development</b> Lock or unlock update to Budget Development and Budget Transfers
<b>Update Budget Transfers</b> Update Transfers In and Transfers Out for a specified phase and FOP.	<b>Budget Prep Security(TEAM)</b> Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.
<b>TTU/TTUS Salary Planner Menu</b> Salary Planner	<b>HSC Salary Planner Menu</b> Salary Planner
<b>HSC-El Paso Salary Planner Menu</b> Salary Planner	<b>Budget Prep Reports</b> View Budget Development and Salary Planner reports.

### SELECTING SCENARIO

From the Salary Planner menu, click on “Edit Scenario”.

Employee Dashboard • Salary Planner

Salary Planner

<b>Edit Scenario</b> Allows Salary Planner users to edit existing scenarios.	<b>Copy Scenario</b> Allows Salary Planner users to copy data from one scenario to another.
<b>Organization Lock</b> Allows Salary Planner users to check the lock status of an organization.	<b>Query Multiple Extracts</b> Allows Salary Planner users to select multiple Budget Extract IDs for combined viewing.
<b>Finance Budget Development</b> Allows access to the Finance Budget Development module in Finance Self-Service.	

On the Edit Scenario screen, you will be required to make a Scenario Selection. Use the dropdown list to select the “Extract ID” for the current Budget Prep cycle.

The Extract ID and Scenario change each year. (As an example, for Budget Prep Fiscal Year 27 the Extract ID is El Paso HSC FY2027 Extract and Scenario is E27SAL.)

Employee Dashboard • Salary Planner • Edit Scenario

### Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

**Scenario Selection**

Extract ID:  ← **Select Extract ID for current Budget Prep Cycle**

Scenario:

**Filter Criteria**

By Position Attributes  By Employee Name

**Select**

Copy Scenario • Organization Lock • Query Multiple Extracts

The corresponding Scenario will populate automatically after selecting the Extract ID.

Employee Dashboard • Salary Planner • Edit Scenario

### Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

**Scenario Selection**

Extract ID:

Scenario:  ← **Scenario will populate automatically after Extract ID is selected**

**Filter Criteria**

By Position Attributes  By Employee Name

**Select**

Copy Scenario • Organization Lock • Query Multiple Extracts

## SELECTING FILTER CRITERIA

Under the Filter Criteria section, you can search multiple positions by choosing the “By Position Attributes” option or search a single employee using the “By Employee Name” option.

The screenshot shows the 'Edit Scenario' page with the following elements:

- Breadcrumb: Employee Dashboard • Salary Planner • Edit Scenario
- Section: Edit Scenario
- Instruction: Choose Extract ID and Scenario, then select filter criteria.
- Scenario Selection:
  - Extract ID: EI Paso HSC FY2027 Extract
  - Scenario: E27SAL
- Filter Criteria:
  - By Position Attributes
  - By Employee Name
- Buttons: Select (red), Copy Scenario, Organization Lock, Query Multiple Extracts

Annotations with blue arrows and boxes:

- A box labeled 'Filter Criteria' points to the radio buttons.
- A box labeled 'To search by single employee' points to the 'By Employee Name' radio button.
- A box labeled 'To search multiple positions' points to the 'By Position Attributes' radio button.

If a merit will be entered for only one employee, select the “By Employee Name” option and click select.

This screenshot is identical to the previous one, but with the following changes:

- The 'By Employee Name' radio button is now selected (indicated by a blue dot).
- A blue arrow points from a box labeled 'To search by single employee' to the selected 'By Employee Name' radio button.

## ENTERING MERIT FOR SINGLE EMPLOYEE

The Employee Filter screen will allow you to enter the Employee's Last Name, First Name or ID (R#).

Click the "Go" button to retrieve that employee's record. [GO TO NEXT STEPS.](#)

Employee Dashboard • Salary Planner • Employee Filter

### Employee Filter

Last Name:

First Name:

ID

**Go**

Position Filter

## ENTERING MERITS FOR MULTIPLE EMPLOYEES

If merits will be entered for multiple employees, on the Filter Criteria section, select "By Position Attributes" and click Select to continue to the next screen.

Employee Dashboard • Salary Planner • Edit Scenario

### Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

#### Scenario Selection

Extract ID:

Scenario:

#### Filter Criteria

By Position Attributes  By Employee Name

**Select**

To search multiple positions

Copy Scenario • Organization Lock • Query Multiple Extracts

The Position Filters screen will allow you to narrow down search results. The Organization will default to "All".

Employee Dashboard • Salary Planner • Position Filters

### Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

#### Update of Budget Development

Chart of Account: E  
Budget ID: E2027  
Budget Phase: E27DPT

E2027, E27SAL

Organization:

Include Subordinate Organizations:

Keep "All" or enter organization number.

Keep "All" in the Organization filter to view all results based on your Budget Prep security or remove the "All" filter and enter the number of the organization you would like to query.

At the bottom of the screen, click on the "List by Employee" button to proceed.

Employee Dashboard • Salary Planner • Position Filters

### Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

#### Update of Budget Development

Chart of Account: E  
Budget ID: E2027  
Budget Phase: E27DPT

E2027, E27SAL

Organization:

Include Subordinate Organizations:

Employee Class:

Include Pooled Positions:

Include Vacant Positions:

List By Employee Summary Totals List By Position

Results will populate for this Organization only.

The List By Employee screen will show the Employee ID and Name for the Organization selected in the Position Filters.

Click on the Employee ID and Name to bring up that employee's record.

Employee Dashboard • Salary Planner • List By Employee

### List By Employee

533712 Department Org, Unlocked

Click on the Employee Name and ID.

DO NOT ENTER MERITS HERE.

ID and Name	Position, Suffix and Title	Employee FTE Totals	Employee Salary Totals	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded From Totals
R02008044 Beth Dutton	E99604 - 00 Clinical Research Coor	0.5	28,000.00	0.5	0.5	28,000.00	0.00	0.00	28,000.00		No
R02008043 Carol Sturka	E99319 - 00 Advanced Practice Provider	1	110,000.00	1	1	110,000.00	0.00	0.00	110,000.00		No
R02008045 Naya Vasquez	E89288 - 00 Assistant Professor-NTT	1	150,000.00	1	1	150,000.00	0.00	0.00	150,000.00		No
Total				2.5	2.5	288,000.00	0.00	0.00	288,000.00		

Totals							
Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary	
533712 - Department Org	2.5	2.5	288,000.00	0.00	0.00	288,000.00	

# EMPLOYEE DETAIL SCREEN

Merits should be entered on the Employee Detail screen. Merits can be entered by percent on the Merit Percent column or by amount using the Merit Amount field.

The screenshot shows the 'Employee Detail' screen for Carol Sturka. A blue box labeled 'ENTER MERITS HERE.' has two arrows pointing to the 'Merit Percent' and 'Merit Amount' input fields in the 'Extracted Jobs' table. The table shows a base salary of 110,000.00 and a proposed FTE of 1.000.

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Salary	Equity Percent	Equity Amount	Merit Percent	Merit Amount	Proposed Salary	Links
E99319 - 00 Advanced Practice Provider	533712 - Department Org	1	1.000	110,000.00	0.00	0.000000	0.00	0.000000	110,000.00	Distribut Commer
Total			1	1	110,000.00	0.00	0.00	0.00	110,000.00	

Enter the merit and click Save to apply the changes.

The screenshot shows the same 'Employee Detail' screen, but with updated merit values. The 'Merit Percent' field now contains '2.00' and the 'Merit Amount' field contains '2200.000000'. A blue box labeled 'Can be entered as Percent or Amount.' has two arrows pointing to these fields. The 'Proposed Salary' has increased to 112,200.00. The 'Save' button at the bottom left is highlighted with a red box and a mouse cursor.

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
533712 - Department Org	1	1	110,000.00	0.00	0.00	110,000.00
Total			1	1	110,000.00	110,000.00

Click on Next to enter merits for other employees in that organization or close screen exit.

Employee Dashboard • Salary Planner • Employee Detail

✓ Your changes were applied successfully.

### Employee Detail

**Employee**  
Name and ID: Carol Sturka R02008043  
Home Organization: 533712 - Department Org

#### Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Salary	Equity Percent	Equity Amount	Merit Percent	Merit Amount	Proposed Salary	Links
E99319 - 00 Advanced Practice Provider	533712 - Department Org	1	<input type="text" value="1.000"/>	110,000.00	<input type="text" value="0.00"/>	<input type="text" value="0.000000"/>	<input type="text" value="2.00"/>	<input type="text" value="2,200.000000"/>	<input type="text" value="112,200.00"/>	Distribut Commer
Total		1	1	110,000.00	0.00	0.00	2.00	2,200.00	112,200.00	

#### Extract Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
533712 - Department Org	1	1	110,000.00	2.00	2,200.00	112,200.00
Total	1	1	110,000.00	2.00	2,200.00	112,200.00

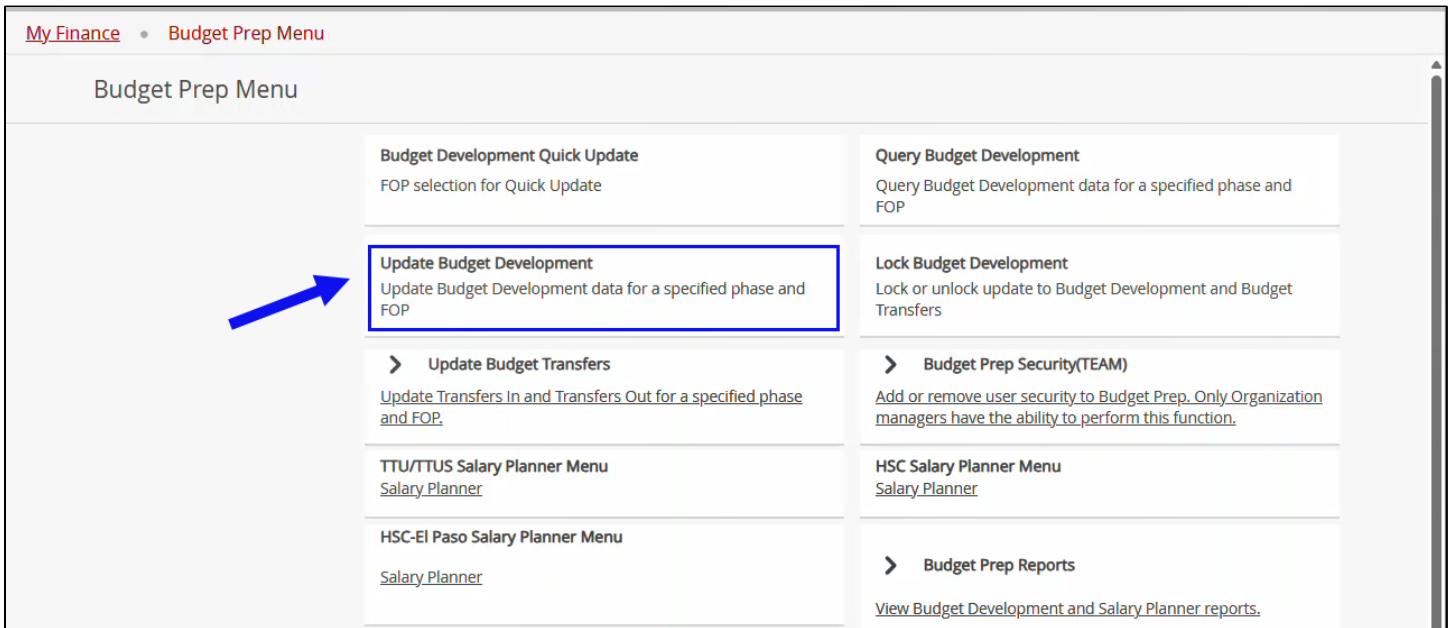
Save   Reset   Previous   **Next**

## Updating Worksheets in Budget Development

Departments will enter and modify their proposed budgets using Budget Development. The following will outline how to make updates to a Worksheet in Budget Development.

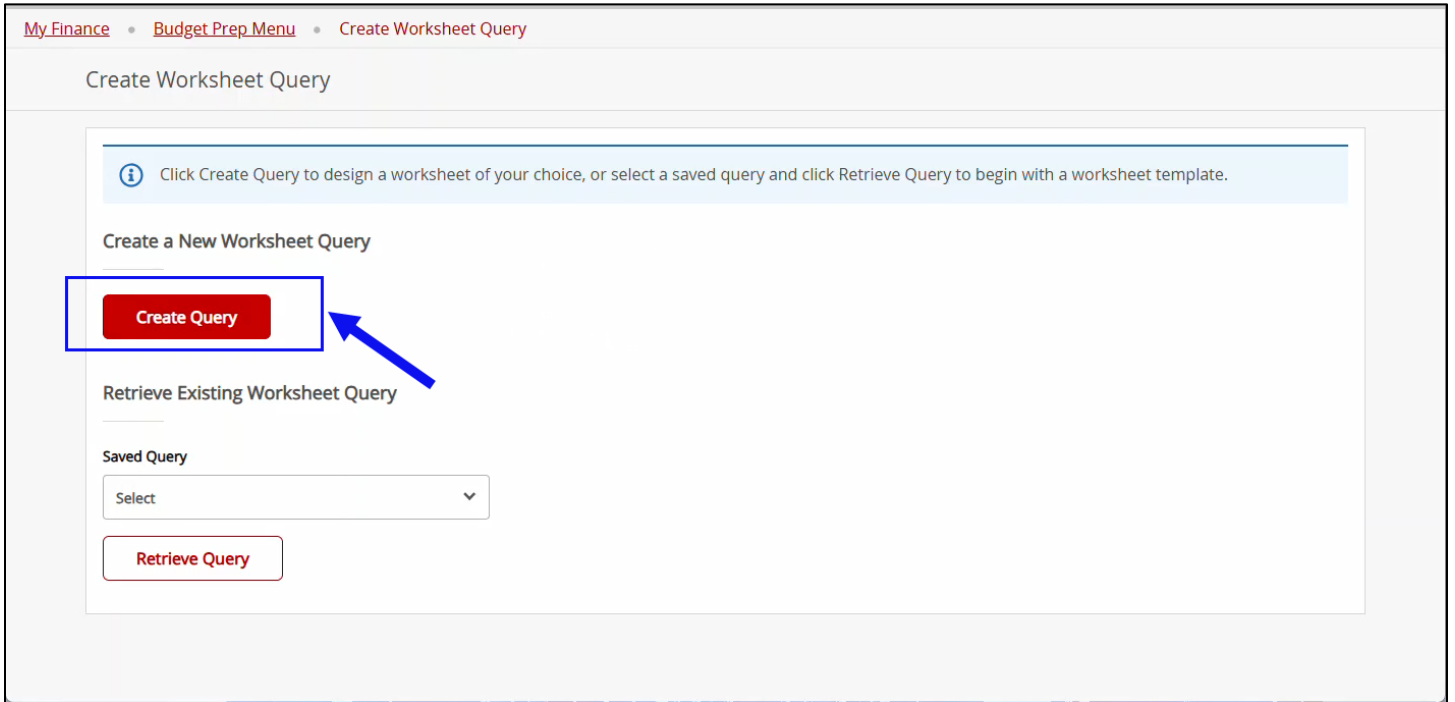
### ACCESSING BUDGET DEVELOPMENT

From the Budget Prep menu, click Update Budget Development.



## CREATING WORKSHEET QUERY

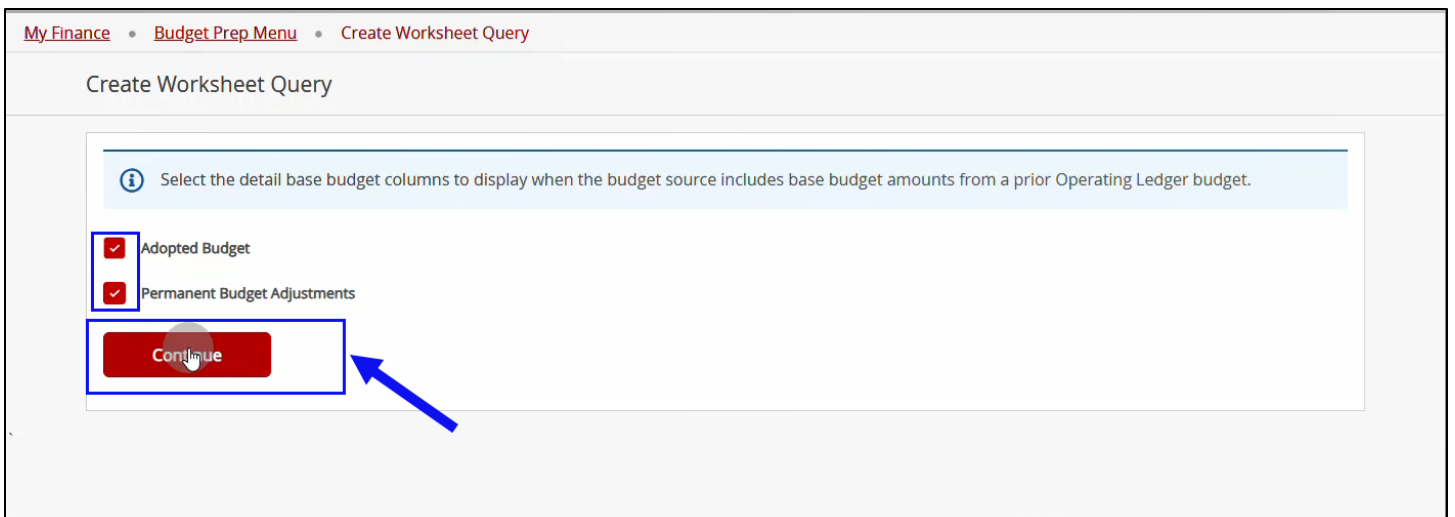
On the Create Worksheet Query screen, click on the Create Query button.



The screenshot shows the 'Create Worksheet Query' interface. At the top, there is a breadcrumb trail: 'My Finance' > 'Budget Prep Menu' > 'Create Worksheet Query'. Below this, the title 'Create Worksheet Query' is displayed. A light blue information box contains the text: 'Click Create Query to design a worksheet of your choice, or select a saved query and click Retrieve Query to begin with a worksheet template.' Underneath, there are two sections: 'Create a New Worksheet Query' and 'Retrieve Existing Worksheet Query'. In the 'Create a New Worksheet Query' section, a red 'Create Query' button is highlighted with a blue rectangular box, and a blue arrow points to it from the right. In the 'Retrieve Existing Worksheet Query' section, there is a 'Saved Query' dropdown menu with 'Select' as the current selection, and a red 'Retrieve Query' button below it.

The next view of the Create Worksheet Query screen will allow you to select the detail base-budget columns to display on the Worksheet.

Check the boxes for both “Adopted Budget” and “Permanent Budget Adjustments” then click on the “Continue” button.



The screenshot shows the next step in the 'Create Worksheet Query' process. The breadcrumb trail remains the same. The title 'Create Worksheet Query' is still present. A light blue information box contains the text: 'Select the detail base budget columns to display when the budget source includes base budget amounts from a prior Operating Ledger budget.' Below this, there are two checked checkboxes: 'Adopted Budget' and 'Permanent Budget Adjustments'. At the bottom of this section, a red 'Continue' button is highlighted with a blue rectangular box, and a blue arrow points to it from the right.

The last Create Worksheet Query screen will allow you to enter the parameters for the Worksheet you want to Query and Update.

The required fields are indicated by an asterisk. These include the Chart of Accounts, Budget ID, Budget Phase, Fund and Organization.

The Program field can be selected to narrow down Worksheet results, but this field is optional.

Select “E” for the Chart of Accounts and in the Budget ID and Budget Phase fields, enter the parameters for the current Budget Prep cycle.

The Budget ID and Budget Phase change each budget cycle. (As an example, for Budget Prep Fiscal Year 27 the Budget ID is E2027 and the Budget Phase is E27DPT.)

The parameters entered will default the next time this screen is accessed, so it’s important to double-check the parameters are what you intend to query each time you access this form.

The screenshot shows the 'Create Worksheet Query' form with the following fields and annotations:

- Chart of Accounts \***: A dropdown menu with 'Select' and a downward arrow. A red box highlights this field, and a red arrow points to it from the 'REQUIRED' label.
- Budget ID \***: A text input field. A red box highlights this field, and a red arrow points to it from the 'REQUIRED' label.
- Budget Phase \***: A text input field with a 'Look up' button. A red box highlights this field, and a red arrow points to it from the 'REQUIRED' label.
- Fund \***: A dropdown menu with 'Select'. A red box highlights this field, and a red arrow points to it from the 'REQUIRED' label.
- Organization \***: A dropdown menu with 'Select'. A red box highlights this field, and a red arrow points to it from the 'REQUIRED' label.
- Program**: A dropdown menu with 'Select'. A blue box highlights this field, and a blue arrow points to it from the 'Optional' label.

A red box labeled 'REQUIRED' encompasses the Chart of Accounts, Budget ID, Budget Phase, Fund, and Organization fields. A blue box labeled 'Optional' encompasses the Program field. A 'Check to Include' checkbox is located at the bottom left of the form.

Below is an example of the required parameters.

The screenshot shows the 'Create Worksheet Query' form. At the top, there is a breadcrumb trail: 'My Finance' > 'Budget Prep Menu' > 'Create Worksheet Query'. Below this, the title 'Create Worksheet Query' is displayed. A blue box highlights the 'EXAMPLE OF PARAMETERS' section, which contains an information icon and the following text: 'Fund and Organization codes must be specified. Program and Account may use specific codes, parameter entry with wildcard %, or may be left blank or use % param' and 'Activity and Location codes must be specified when updating budget line with Activity and Location, otherwise use a blank parameter for worksheet updates without'. Below this, several fields are shown: 'Chart of Accounts \*' with a dropdown menu containing 'E'; 'Budget ID \*' with a text input containing 'E2027'; 'Budget Phase \*' with a dropdown menu containing 'E27DPT' and a 'Look up' button; 'Fund \*' with a dropdown menu containing '183199'; 'Organization \*' with a dropdown menu containing '533712'; and 'Program' with a dropdown menu containing 'Select'. At the bottom, there is a 'Check to Include' section with a checkbox for 'Revenue Accounts' which is checked.

The bottom section, labeled “Check to Include” will allow you to select the types of accounts you would like to display on the Worksheet. Check the boxes for “Revenue Accounts”, “Labor Accounts”, “Expenses,” and “Transfers”. Leave the “Deleted Items” box unchecked.

Then click the “Submit” button.

The screenshot shows the 'Create Worksheet Query' form, focusing on the 'Check to Include' section. The 'Program' dropdown menu is set to 'Select'. The 'Check to Include' section has four checked checkboxes: 'Revenue Accounts', 'Labor Accounts', 'Expenses', and 'Transfers', and one unchecked checkbox: 'Deleted Items'. Below this, there is a 'Save Query as' text input field and a 'Shared' checkbox which is unchecked. At the bottom, a red 'Submit' button is highlighted with a blue box.

# UPDATING WORKSHEET

The Worksheet displays various columns including the Program, Account Type or Code, Title, Adopted Budget, Proposed Budget and Change Value columns.

The figures on the Proposed Budget column will be presented as the next fiscal years' operating budget.

My Finance • Budget Prep Menu • Create Worksheet Query • Account Detail

Account Detail Return to My Worksheets

*The Budget Development Worksheet allows you to calculate a mass change for all budget lines and/or change individual line items. Mass change updates are not applied to budget lines containing a row-specific change value. All change values are incremental adjustments and can be positive or negative. Budget lines can be added or deleted....*

Worksheet Parameters

**Budget Account Code (BAC)**      **Previous cycle's budget**      **Next year's operating budget.**

Worksheet 4 Requery Calculate Post

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		10		Instruction										
			6Z	Budget Acc - Salaries and Wages										
SALP	N		6001	Faculty Salaries	0.00	0.00	0.00	P	150,000.00			150,000.00	150,000.00	<input type="checkbox"/>
		35		Patient Care										
			6Z	Budget ACC - Salaries and Wages										
SALP	N		6002	Staff Salaries	0.00	0.00	0.00	P	84,100.00			84,100.00	84,100.00	<input type="checkbox"/>
		40		Academic Support										
			7Z	Budget Acct - Expenditures										
NEW	N		7010	Maintenance and Operations	0.00	0.00	0.00	P	5,000.00			5,000.00	5,000.00	<input type="checkbox"/>

Changes to the existing budget lines will be entered in the Change Value fields.

Enter the net increase or decrease for each budget line using whole dollars only, please do not enter decimals.

Indicate a decrease using a minus sign. An increase does not need to be indicated by a plus sign.

Click the Post button to apply the changes you entered.

My Finance • Budget Prep Menu • Create Worksheet Query • Account Detail

Worksheet Parameters

Worksheet 4

Request Query Calculate **Post**

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		10		Instruction										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6001	Faculty Salaries	0.00	0.00	0.00	P	150,000.00			150,000.00	150,000.00	<input type="checkbox"/>
		35		Patient Care										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6002	Staff Salaries	0.00	0.00	0.00	P	84,100.00			84,100.00	84,100.00	<input type="checkbox"/>
		40		Academic Support										
			7Z	Budget Acct - Expenditures										
NEW	N		7010	Maintenance and Operations	0.00	0.00	0.00	P	5,000.00	3000		5,000.00	5,000.00	<input type="checkbox"/>
NEW	N		7035	Food and Entertainment	0.00	0.00	0.00	P	2,000.00	-500		2,000.00	2,000.00	<input type="checkbox"/>
			DELETED	Revenue	0.00	0.00	0.00		0.00			0.00		
			DELETED	Salaries and Wages	0.00	0.00	0.00		0.00			0.00		
			DELETED	Expenses	0.00	0.00	0.00		0.00			0.00		
			DELETED	Transfers	0.00	0.00	0.00		0.00			0.00		

Enter net increase or decrease in Change Value field.

Enter whole numbers only; no decimals.

Use a minus (-) sign to indicate a decrease.

The Proposed Budget amount will update to reflect the changes after posting.

My Finance • Budget Prep Menu • Create Worksheet Query • Account Detail

The changes submitted have been processed and posted.

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		10		Instruction										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6001	Faculty Salaries	0.00	0.00	0.00	P	150,000.00			150,000.00	150,000.00	<input type="checkbox"/>
		35		Patient Care										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6002	Staff Salaries	0.00	0.00	0.00	P	84,100.00			84,100.00	84,100.00	<input type="checkbox"/>
		40		Academic Support										
			7Z	Budget Acct - Expenditures										
NEW	N		7010	Maintenance and Operations	0.00	0.00	0.00	P	8,000.00			8,000.00	8,000.00	<input type="checkbox"/>
NEW	N		7035	Food and Entertainment	0.00	0.00	0.00	P	1,500.00			1,500.00	1,500.00	<input type="checkbox"/>

Change will reflect on the Proposed Budget amount.

Additional budget lines may be added to the worksheet using the same FOAPAL worksheet parameters. If there is no worksheet parameter for Program or Account, then the code must be entered with a new row....

## ADDING A NEW BUDGET LINE

If a budget line does not exist on the Worksheet, a New Row can be added manually.

Under New Row 1, select the Program from the dropdown, enter the 4-digit Budget Account Code, and enter the Proposed Budget amount. Keep “Permanent Budget” as the Budget Duration.

Click the Post button to add the new budget line.

The screenshot displays a budgeting application interface. At the top, a breadcrumb trail reads: **My Finance** • **Budget Prep Menu** • **Create Worksheet Query** • **Account Detail**. A green notification box in the top right corner states: "The changes submitted have been processed and posted."

The main area shows a table of expenditures with columns for status, program, account, and amounts. The first two rows are highlighted:

NEW	N	7010	Maintenance and Operations	0.00	0.00	0.00	P	8,000.00			8,000.00	8,000.00	
NEW	N	7035	Food and Entertainment	0.00	0.00	0.00	P	1,500.00			1,500.00	1,500.00	
DELETED			Revenue	0.00	0.00	0.00		0.00			0.00	0.00	
DELETED			Salaries and Wages	0.00	0.00	0.00		0.00			0.00	0.00	
DELETED			Expenses	0.00	0.00	0.00		0.00			0.00	0.00	
DELETED			Transfers	0.00	0.00	0.00		0.00			0.00	0.00	

Below the table is an information box: "Additional budget lines may be added to the worksheet using the same FOAPAL worksheet parameters. If there is no worksheet parameter for Program or Account, then the code must be entered with a new row...." (with a dropdown arrow).

The "New Row" form below has the following fields and annotations:

- Program:** A dropdown menu with "Select" visible. An arrow points to it from the annotation "Enter Budget Account Code (BAC)." (Note: the annotation text in the image is slightly off).
- Account:** An empty text input field. An arrow points to it from the annotation "Enter amount in whole dollars." (Note: the annotation text in the image is slightly off).
- Budget Duration:** A dropdown menu with "Permanent Budget" selected. An arrow points to it from the annotation "Use 'Permanent Budget.'"
- Proposed Budget:** An empty text input field.

Below the form are three buttons: "Requery" (light red), "Calculate" (light red), and "Post" (dark red). The "Post" button is highlighted with a blue box.

At the bottom, a "Summary Totals" table is visible:

Account Type	Account Type Title	Base Budget	Proposed Budget	New Budget	Cumulative Change
6Z	Budget Acct - Salaries and Wages	0.00	234,100.00	234,100.00	234,100.00

## ENTERING COMMENTS

Comments can be entered to provide information for each budget line. This can be done by clicking on the blue hyperlinked account code.

Account Detail Return to My Worksheets

The Budget Development Worksheet allows you to calculate a mass change for all budget lines and/or change individual line items. Mass change updates are not applied to budget lines containing a row-specific change value. All change values are incremental adjustments and can be positive or negative. Budget lines can be added or deleted....

Worksheet Parameters

Worksheet 5 Requery Calculate Post

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		10		Instruction										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6001	Faculty Salaries	0.00	0.00	0.00	P	150,000.00			150,000.00	150,000.00	<input type="checkbox"/>
			7Z	Budget Acct - Expenditures										
NEW	Y		7099	Inallocated expenses	0.00	0.00	0.00	P	6,000.00			6,000.00	6,000.00	<input type="checkbox"/>
		35		Patient Care										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6002	Staff Salaries	0.00	0.00	0.00	P	84,100.00			84,100.00	84,100.00	<input type="checkbox"/>
		40		Academic Support										

Enter a comment in the Budget Text box and click Save.

Detail

Budget Development Text ×

Budget Text, Print:

Enter comments here.

Budget Text, No Print:

Add budget line notes

Save

## VIEWING TRANSACTION HISTORY

A budget line's transaction history can be viewed by clicking on the blue hyperlink amount under the Proposed Budget column.

My Finance • Budget Prep Menu • Create Worksheet Query • Account Detail

Account Detail Return to My Worksheets

The Budget Development Worksheet allows you to calculate a mass change for all budget lines and/or change individual line items. Mass change updates are not applied to budget lines containing a row-specific change value. All change values are incremental adjustments and can be positive or negative. Budget lines can be added or deleted....

Worksheet Parameters

Worksheet 5 Requery Calculate Post

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		10		Instruction										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6001	Faculty Salaries	0.00	0.00	0.00	P	150,000.00			150,000.00	150,000.00	
			7Z	Budget Acct - Expenditures										
NEW	Y		7099	Unallocated Expenses	0.00	0.00	0.00	P	6,000.00			6,000.00	6,000.00	
		35		Patient Care										
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6002	Staff Salaries	0.00	0.00	0.00	P	84,100.00			84,100.00	84,100.00	
		40		Academic Support										

The transaction history will display at the bottom under Query Results.

My Finance • Budget Prep Menu • Account Detail Return to My Worksheets

The Budget Development Worksheet allows you to calculate a mass change for all budget lines and/or change individual line items. Mass change updates are not applied to budget lines containing a row-specific change value. All change values are incremental adjustments and can be positive or negative. Budget lines can be added or deleted....

Worksheet Parameters

Worksheet 5 Requery Calculate Post

**Budget Development History**

Fund	183199	Local Fund 1
Organization	533712	Department Org
Account	7099	Unallocated Expenses
Program	10	Instruction
Activity	-	-
Location	-	-
Duration Code	P	-

**Transaction History**

**Query Results**

User ID	Date	Time	Prior Proposed Budget	Change Amount	New Proposed Budget	Delete
KWJ989	Apr 14, 2026	16:19 pm	0.00	6,000.00	6,000.00	N

## SUMMARY TOTALS

The bottom of the Worksheet provides a Summary Totals view. This can be used along with Cognos Budget Prep reports for additional review and reconciliation.

*NOTE: Budgets are balanced at the fund level. If a fund has budgets under multiple organizations, the Summary Totals view will not include totals from other organizations.*

The screenshot shows a web-based budget worksheet interface. At the top, there are navigation links: [My Finance](#), [Budget Prep Menu](#), [Create Worksheet Query](#), and [Account Detail](#). Below the navigation, a header row displays: DELETED Salaries and Wages 0.00 0.00 0.00 0.00 0.00. A blue information banner states: "Additional budget lines may be added to the worksheet using the same FOAPAL worksheet parameters. If there is no worksheet parameter for Program or Account, then the code must be entered with a new row...". Below this is a form for adding a new row with columns: New Row (1), Program (Select dropdown), Account (text input), Budget Duration (Permanent Budget button), and Proposed Budget (text input). Below the form are buttons: Add Row (+), Requery, Calculate, and Post. A blue-bordered box highlights the 'Summary Totals' table.

Account Type	Account Type Title	Base Budget	Proposed Budget	New Budget	Cumulative Change
6Z	Budget Acct - Salaries and Wages	0.00	234,100.00	234,100.00	234,100.00
<b>60</b>	<b>Salaries and Wages</b>	<b>0.00</b>	<b>234,100.00</b>	<b>234,100.00</b>	<b>234,100.00</b>
7Z	Budget Acct - Expenditures	0.00	15,500.00	15,500.00	15,500.00
<b>70</b>	<b>Expenses</b>	<b>0.00</b>	<b>15,500.00</b>	<b>15,500.00</b>	<b>15,500.00</b>
<b>Net Total</b>		<b>0.00</b>	<b>(249,600.00)</b>	<b>(249,600.00)</b>	<b>(249,600.00)</b>