Creating an Appointment Level Budget

To charge a student, grad or an internal employee to an account other than the department default account, please follow these steps.

From the Main Menu, click on the Set Up HCM link.
Under the **Product Related Folder**, click on the **Commitment Accounting** link.

Click on the **Department Budget Table USA** link under the Budget Information Folder.
On the Department Budget Table USA panel, click Add A New Value
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Complete the following fields:

**Department**: Should be the department # the job is in

**Fiscal Year**: four digit current fiscal year

**Budget Level**: Appointment

**Empl ID**: Enter in the 9 digit employee ID for the employee

**Empl Record #**: Enter in the record # that will be charged to a different account

Then click **Add**
On this screen, click on the **Dept Budget Earnings** Tab

Change the **Effective date** to the start date of the job.

*Please remember this date must be the first Sunday of a pay period or it will not charge correctly.*

Change the status field to **Active**.
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Under the Earnings Distribution:

- Enter a ‘1’ in the Sequence number field; this will open up the distribution % field.
- Click on the Chartfield Details link to search for the CFS to charge.

On this panel, enter in the Fund Code and Department ID only.

Click the Search button located in the upper right corner of the screen.
Click the Select button next to the account to be charged.

The CFS will populate the fields. Please double check they are correct and then click OK.
In the **Distribution percentage field**, enter in the percentage to charge the CFS.

This can be any percentage but please note that the department budget table will not save until the total distribution for all rows equal 100%.

If more CFS’s need to be added, please click on the plus (+) on the bottom right and repeat the earnings distribution steps.

Once all CFS’s are added, click the **Save** button.
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Under the **Level Tier**, click the plus (+) to add in the inactive row.

Change the **Effective date** to the end date of the job.

*Please remember this also must be the first Sunday of a pay period or it will not charge correctly.*

Change the **status** field to **Inactive**

Click the **Save button**.