



Budget Clearance Form Instructions

The Budget Clearance Form is a tool designed to help in planning positional changes to regular (non-temporary) staff and faculty. The Budget Clearance Form process allows departments, Senior Officers, and the Budget Coordination Office to track anticipated changes to appointments and positions, and to ensure that adequate funding is available.

When to use the form:

- ▶ For an open position - An employee either leaves the university or transfers to another department.
- ▶ For a reclassified position - An employee is promoted, receiving either a new title and/or an increase in pay.
- ▶ For a new position - There is currently no budget line for the position. Departments are responsible for providing 27% of the salary for fringe benefits.
- ▶ For an increase/decrease in effort - A current employee receives a change to their FTE. This process affects budget lines and they have to be adjusted accordingly.

Instructions:

Prior to submitting paperwork to the Office of Human Resources, departments should have proposed budgets authorized by Senior Officers and the Budget Coordination Office. Once clearance is approved, a copy of the Budget Clearance Form with the appropriate signatures will be sent to the requesting department.

Please refer to your Budget Activity Report for a detailed description of your budget line items.

1. Indicate whether the position is General Fund or Non-General Fund by entering the shortcode in the appropriate box.
2. Enter the name of the person who prepared the form, the department, and the date.
3. Enter the name of the current or most recent employee.
4. Enter the Department ID and Line #.
5. Enter the Present Title, Present FTE, and Present Budget. The Present Budget amount should be the actual amount budgeted for the line. This may vary from the actual salary amount.
6. Enter the Proposed Title, Proposed FTE, and Proposed Budget, even if they are the same as the present information.
7. If there is a difference between the Present Budget and the Proposed Budget, the amount will automatically be reflected in the Over Budget field. **If there is an amount in the "Over Budget" field, the Funding Source/Transfer section MUST be completed.** (See #10.) To determine if Fringe Benefits should be applied, see #8. FBs are only applied to positive numbers.

8. The Fringe Benefits field should be completed for new positions or when transferring more than \$1,000 from a non-salary budget line (such as Expenses or Supplies & Other) to fund the Over Budget amount. Fringe Benefits are 27% of the Over Budget amount.
9. Complete the Fringe Funding Source section if you are responsible for addressing Fringe Benefits. Indicate which budget line(s) will be debited to supply the funding.
10. Complete the Funding/Transfer Source if there is an amount in the "Over Budget" field. Indicate which budget line(s) will be either debited/credited to balance the proposed budget.
11. Use the "Notes" section to provide any additional information or comments.

The appropriate Director/Supervisor, Dean, and Senior Officer must sign the Budget Clearance Form. Be sure to retain a copy for your files.

Completed and signed forms are to be submitted to the Budget Coordination Office at 1161 Administration Building for processing. You can view all processed forms in the Budget System, located on the Budget Coordination Office website.

Questions regarding the Budget Clearance Form and budget line items should be directed to the Budget Coordination Office at ext. 3-5412.