Higher Education PC Input Form (5200)

Initiator: Any Higher Education budget employee
Reason: This form is for higher education institutions, to report Personnel Cost (PC) changes in their budgets.
General Notes:

- Institutions of higher education will utilize this form to enter any salary and benefit changes for the budget year.

- Decision Units (DU) available in this form:
  - **10.11** – Change in Health Benefit Costs
  - **10.12** – Change in Variable Benefit Costs
  - **10.13** – Other Benefit Changes
  - **10.19** – Employee Benefits Fund Shift
  - **10.61** – Salary Adjustments – Regular Employees
  - **10.62** – Salary Adjustments – Group and Temporary
  - **10.63** – Salary Adjustments – Elected Officials
  - **10.67** – Compensation Schedule Changes
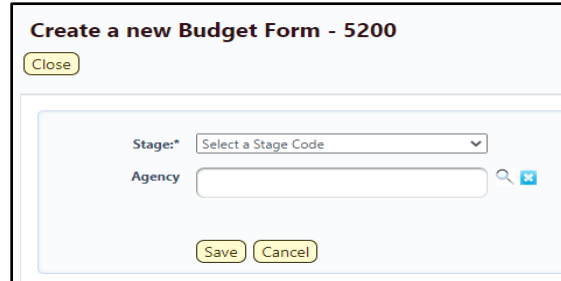 - **10.69** – CEC Fund Shift

Create a Parent Entry

1. Select form 5200 from the form dropdown menu to open the form's summary overview screen. This screen will list all entries matching the stages (workflow steps) associated with the user's access in the system.
   - i.e. Listed forms have not been "submitted", moved to other stages, or have been returned to the user from another stage.

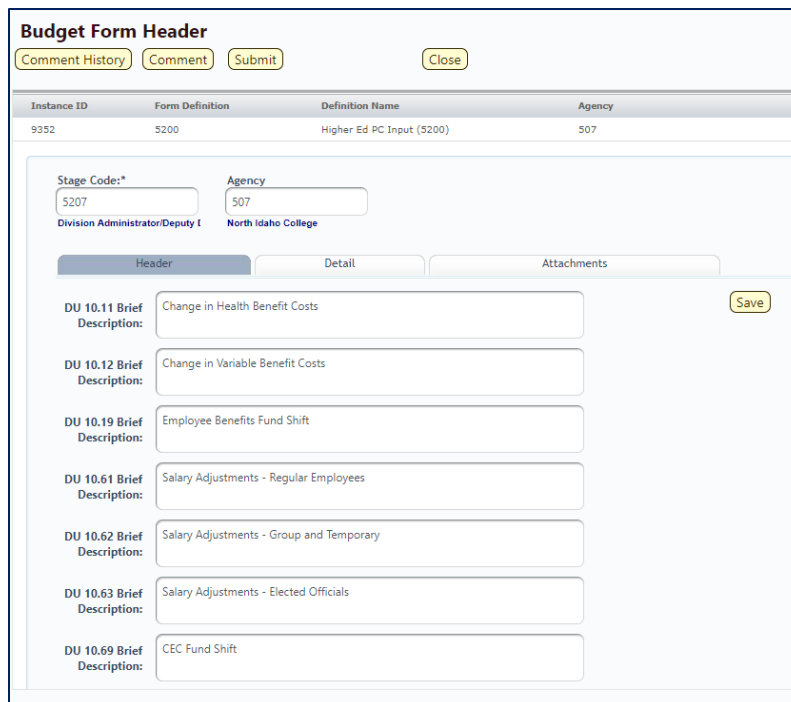2. Click **Add New** open the "Create a new Budget Form – 5200" screen.

3. Select the appropriate **Stage** and **Agency**.
   - Not all budget forms start in Stage 1.
   - Agencies you have permission to access will appear in the field's lookup tool

Create a new Budget Form - 5200

Close

Stage:*	Select a Stage Code ⌄
Agency	🔍 ✱

Save Cancel

4. Click **Save** to continue to the "Budget Form Header" screen.

HEADER TAB

- The "Budget Form Header" tab is used to enter a narrative that will feed into the Executive Detail Report.

- The standard Brief Descriptions for each of the DU's that appear on this report have been pre-populated, but are all editable and can be added to or changed if necessary.

Budget Form Header

Comment History Comment Submit   Close

Instance ID	Form Definition	Definition Name	Agency
9352	5200	Higher Ed PC Input (5200)	507

Stage Code:*	Agency
5207	507
Division Administrator/Deputy D	North Idaho College

Header	Detail	Attachments

DU 10.11 Brief Description:	Change in Health Benefit Costs	Save
DU 10.12 Brief Description:	Change in Variable Benefit Costs	
DU 10.19 Brief Description:	Employee Benefits Fund Shift	
DU 10.61 Brief Description:	Salary Adjustments - Regular Employees	
DU 10.62 Brief Description:	Salary Adjustments - Group and Temporary	
DU 10.63 Brief Description:	Salary Adjustments - Elected Officials	
DU 10.69 Brief Description:	CEC Fund Shift	

5. Review the descriptions, adding any additional explanation as necessary for entries on the Detail Tab.

6. Once complete click **Save**, and navigate to the "Detail" tab.

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DETAIL TAB

- Financial transactions from all DU's listed above can be entered and managed from this tab.

- The DU number is selected in the dialog that opens after you click **Add New**.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	DU 10.11	DU 10.12	DU 10.19	DU 10.61	DU 10.62	DU 10.63	DU 10.69	Total Expenses	Total FTP
9372	5200	514 - University of Idaho	Higher Ed PC Input (5200)	$0	$0	$0	$0	$0	$0	$0	$0	0.00

Quick Search:

Enter search criteria here...

Actions:

Add New   Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	DU*	Account*	OG / OT*	FTP	Amount*	Comments / Notes
There are no records available.												

Records per page: 50 ⤋   Records: 0 - 0 of 0 - Pages: ⏮ ◀ 1 ▶ ⏭

7. Enter data:

Note: As amounts are being assigned, the totals on the top of the detail screen will track how much is entered on the form.

- **Add New:** This button will open the Add New Line utility, allowing the user to manually enter a new form line.

- **Copy:** This button allows users to copy a highlighted form line, saving time and effort when new lines share previously created form line details.

- **Export/Import:** Click **Export** to pull the template and any existing line information. Modify the form in Excel and save it before clicking **Import** to upload your changes.

- **Pencil Edit:** Clicking the pencil icon at the end of a form line will allow the user to make quick edits to form line fields (e.g. Amount, FTP, etc.).

- **Lookup (Magnifying Glass):** Opens a contextual search utility that displays all available options for the field.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency
1975	5900	140 - State Controller

Quick Search:

Enter search criteria here...

Actions:

Add New   Copy

Row	Audit Trail	Approp*	Fund*
1	🔍	140	0	0

Records per page: 50 ⤋

Budget Form Entry - Add New Line
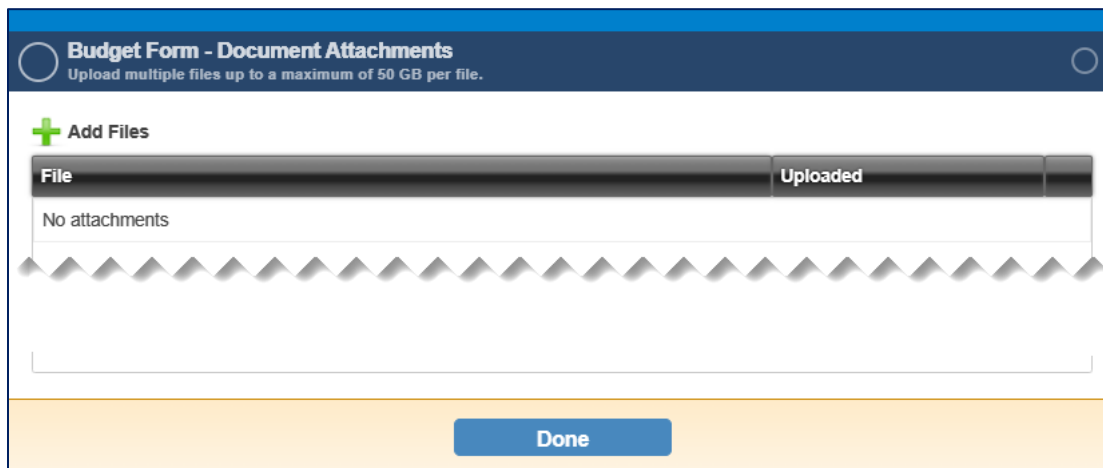
- ➢ **Approp:** Select the appropriation unit (AU) relevant to this line entry.
- ➢ **Fund:** Select the appropriate fund number.
- ➢ **DU:** Select the Decision Unit that is relevant for the line entry.
- ➢ **Program** (optional): Select an associated program if your agency enters its budget with that level of detail.
- ➢ **Project** (optional)**:** Select an associated project if your agency enters its budget with that level of detail.
- ➢ **OG/OT:** Designates if the line is on-going (OG) or one-time (OT).
- ➢ **Org Unit** (optional)**:** Select an associated organizational unit if your agency enters its budget with that level of detail.
- ➢ **Comments/Notes:** Line specific notes can be added to this field.
- ➢ **FTP:** Enter any relevant FTP values for the line.
- ➢ **Amount:** Enter the dollar amount for the line.
- ➢ **Audit Text:** Comment fields, visible only on the form line audit history screen.

    8. Once the line entry is filled out, click **Save** then **Close** to return to the "Detail" tab.

ATTACHMENT TAB

Selecting the "Attachment" tab will open the "Budget Form – Document Attachments" utility. Clicking **Add Files** will open a file explorer dialogue, allowing you to locate and select the document(s) you would like to upload to the form. Please upload any documentation relevant for helping you arive at the values reporterd on this form.

Note: You may upload multiple documents at once as long as they do not exceed the 50 GB file limit.

Result: You successfully repored on any PC changes in the upcoming budget year.

Additional training resources can be found on the SCO website's Luma Budget Training page: https://www.sco.idaho.gov/LivePages/luma-budget-support-and-training.aspx

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