# Add a Position to the Budget

The purpose of this job aid is to explain how to add an existing Position or a new Position to the Budget.

NOTE: Changes are updated in real-time.

1. From the EPM homepage, select the **Departmental Budget** icon.
2. Select the **Position Budget Forms** icon.
3. Click **Existing Positions by Department** link**.**

4. Positions have been loaded by Funding Department tied to the funding cost center. This may be different than the Owning Department. Review the department number and name listed in the box marked "Department." If not selected, click on Department and search for the desired value. Once selected, click "Ok," choice will be highlighted in yellow. Click the "Go" arrow to update view.
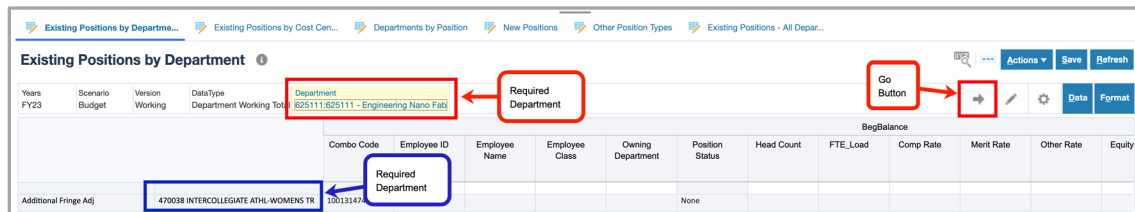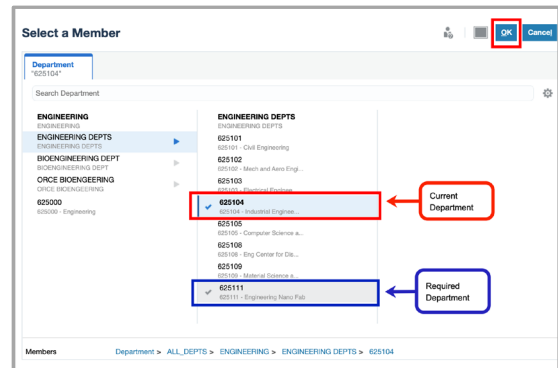
5. Review positions listed. If the desired position to be added is not listed, click on the "New Positions" link. Review Department and Cost Center information. **Confirm you have selected the correct department and cost center combo first. If NO combo code loads automatically, the department/cost center do not currently tie together. The combo code is extremely important.** Adjust as necessary.

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6. Adding New Position 1, New Position 2, etc. is performed by clicking in the cells across the grid and completing the following fields:

- Employee ID, without leading or ending spaces.

- Employee Name (ex. LastName,FirstName)

- Employee Class – Select the entry from the drop-down menu (e.g. A&P, CLS, FAC)

- Owning Department – Enter department number or click the drop-down menu. This is the department that owns the position and is not necessarily the same as the funding department.

- Head Count

- FTE Load

- Comp Rate

- Distribution (e.g. 1=100%, 0.75 = 75%, 0.50 = 50%, etc.)

- Coverage Code (if known)**

- Benefit Plan (if known)**
  **If left blank, calculates as vacant.
  **If known, use the drop-down to select.
  **If not known but desired, contact your Budget Resource to add.

- **Add the UTShare Position ID to Employee Name for tracking purposes.**
  - Enter "LastName,FirstName - P12345678" if position number is known
  - Enter "LastName,FirstName - P#TBD" if position number is currently unknown

For New Position records, review and update for all known Employee Name, Employee ID and Position #'s before budget is closed. Insure that Employee Name hasn't changed since initial entry.

NOTE: If a new position is added incorrectly, it can be deleted if still highlighted in yellow or if already saved by clicking in the cell and deleting the information then saving.

7. After saving the data, Position Status changes to Vacant or Filled position (depending if a name and Empl ID are supplied); Fringe Subtotal calculates at the default unless updated to actuals using drop-down; FTE Subtotal and FTE Classified are calculated.

8. The New Position is displayed in the Existing Positions by Department and the Existing Positions by Cost Center data forms.