

TBA (To Be Announced) Checklist

Adding a TBA record to your account

1. From the KFS Main Menu, select **Budget Construction**
2. Select the **org salary settings** button from the **BC Selection Screen**
3. Select the **organization** checkbox for the department or college that house the TBA templates created for you, above, and then click the **view** button next to **Show Position Pick List**
4. Enter **Z*** into the **Position Number** field and **CO-xxxx** (substitute xxxx with your department number) into the **Department Id** field, then click **search**

Position Number:	<input type="text" value="Z*"/>
Position Type:	<input type="text"/>
Position Description:	<input type="text"/>
Department ID:	<input type="text" value="CO-1370"/>
Salary SetId:	<input type="text"/>
Plan:	<input type="text"/>
Grade:	<input type="text"/>
Person Name:	<input type="text"/>
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> <input type="button" value="extended"/>	

14 items retrieved, displaying all items.

Actions	Position Number	Position Type	Position Description	Department ID	Salary SetId	Plan	Grade	Person
Posn Salset	Z063137	TF	TBA 1Y Tmp Fac 9 Month	CO-1370		9	N	NOT FUNDED
Posn Salset	Z163137	FA	TBA Faculty 9 Month	CO-1370		9	N	NOT FUNDED
Posn Salset	Z263137	FA	TBA Faculty 12 Month	CO-1370		12	N	NOT FUNDED
Posn Salset	Z363137	AP	TBA Admin Pro 9 Month	CO-1370		9	N	NOT FUNDED
Posn Salset	Z463137	AP	TBA Admin Pro 12 Month	CO-1370		12	N	NOT FUNDED
Posn Salset	Z563137	FF	TBA Fed Fac 9 Month	CO-1370		9	N	NOT FUNDED
Posn Salset	Z600301	SC	TBA State Classified	CO-1370		12	N	NOT FUNDED
Posn Salset	Z663137	FF	TBA Fed Fac 12 Month	CO-1370		12	N	NOT FUNDED
Posn Salset	Z763137	FP	TBA Fed AP 9 Month	CO-1370		9	N	NOT FUNDED
Posn Salset	Z863137	FP	TBA Fed AP 12 Month	CO-1370		12	N	NOT FUNDED
Posn Salset	Z963137	SC	TBA State Classified	CO-1370		12	N	NOT FUNDED
Posn Salset	ZA63137	TF	TBA 1Y Tmp Fac 12 Month	CO-1370		12	N	NOT FUNDED
Posn Salset	ZB63137	TA	TBA 1Y Tmp AP 9 Month	CO-1370		9	N	NOT FUNDED
Posn Salset	ZC63137	TA	TBA 1Y Tmp AP 12 Month	CO-1370		12	N	NOT FUNDED

5. The templates created for you, should all appear in your list of retrieved positions as pictured above.
 - a. If you cannot find the templates created, clear out the **Position Number** field and **search** all TBA's. Contact the Office of Budgets if you continue to experience difficulty locating your TBA templates.
6. Click **Posn Salset** next to the TBA template that you want to assign a person or group to; be sure to select the template appropriate for the position(s) you are trying to assign, for example if you are trying to budget for a twelve month Administrative Professional position then chose the **"TBA Admin Pro 12 Month"** template to work with.
 - a. Example #1: Your department has just hired Daisy Duck for an Accounting Tech I position and she will begin work on August 1st. Select the TBA template with a **Position Description** of **"TBA State Classified."**
 - b. Example #2: Your College will be hiring a group of nine-month temporary faculty, you have budget of \$215,000 but do not know who will fill the positions yet. Select the TBA template with a **Position Description** of **"TBA 1Y Tmp Fac 9 Month."**
7. A new screen called **Salary Setting by Position** will open; this is where you will make entries specific to the TBA position you are setting up.
 - a. **Position Funding:**
 - i. Enter account number and sub-account number (if needed)

- ii. Add an **Incumbent Person Name** – this should always begin with “TBA”
 - 1. Example #1: **TBA – Daisy Duck**
 - 2. Example #2: **TBA – Summer Session Adjuncts**
 - iii. Click **add incumbent** after you’ve entered the **Incumbent Person Name**, this will trigger the system to create a unique position number (these always begin with the letter Z) that will appear in the **Emplid** field
 - iv. Next you will enter the **Request Amount, Months, and Percent Time (FTE)**, then click the **add** button.
- b. You can continue adding your TBA’s to this screen before exiting
- i. For example: you have identified 15 different State Classified TBA’s that you need to set up in Budget Construction so you can add the **account/salary/months/percent time** and generate an **Emplid** for the first TBA, and then add another line with the **account/salary/months/percent time** and generate an **Emplid** for the second TBA, and so on until all 15 TBA’s have been added to the screen. Be sure to **save** your work. Below is an example of multiple entries for different incumbents on different accounts that all fall within the same “**TBA State Classified**” template.

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<input type="checkbox"/>	CO Colorado State University	1355410 Assoc. VP Finance & Budget	-----	5408 Bud SC TBA	---	Z10802998 TBA- Minnie Mouse(auto)																																		
<table border="1"> <thead> <tr> <th>Row Operation</th> <th>Amount</th> <th>Hourly Rate</th> <th>Months</th> <th>Percent Time</th> <th>FTE</th> <th>Reason Select</th> <th>Reason Amount</th> </tr> </thead> <tbody> <tr> <td>Request:</td> <td>40,000</td> <td>0</td> <td>12</td> <td>100</td> <td>1.00000</td> <td>▼</td> <td>0</td> </tr> <tr> <td>Leave Request CSF: NONE No Leave</td> <td>0</td> <td></td> <td></td> <td>0</td> <td>0.00000</td> <td></td> <td></td> </tr> <tr> <td>Total Intended:</td> <td>0</td> <td></td> <td></td> <td></td> <td>0</td> <td></td> <td></td> </tr> </tbody> </table>									Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount	Request:	40,000	0	12	100	1.00000	▼	0	Leave Request CSF: NONE No Leave	0			0	0.00000			Total Intended:	0				0		
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<input type="checkbox"/>	CO Colorado State University	1355400 Budget Office Expenses	-----	5408 Bud SC TBA	---	Z60402999 TBA- Daisy Duck(auto)																																		
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- c. Review the Totals section at the bottom of the screen to ensure that the **Request Amount** and **FTE** are as you intended, then **save** and **close** the **Salary Setting by Position** screen
8. Repeat steps 6 & 7 until you have finished setting up all of the different types TBA positions that have been identified for your college/area.