

## 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**

The screenshot shows a search form with the following fields and values:

- Position Number: Z\*
- University Fiscal Year: 2021
- Position Regular Temporary: (dropdown menu)
- Position Salary Grade Default: (text field)
- Position Union Code: (text field)
- Position Description: (text field)
- Position Department Identifier: CO-1372
- Position Salary Plan Default: (text field)
- Position Type: (text field)
- Default Object Code: (text field)

Buttons: Search, Clear, Cancel

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 choose 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 1<sup>st</sup>. 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 different 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. From there add another line with the **account/salary/months/percent time** and generate an **Emplid** for the second TBA, and so on until all of the desired TBA's have been added to the screen. Be sure to **save** your work. Below is an example of an incumbent with an account that falls within the "TBA Admin Pro" template. Click on the "add" function to add the current funding line and the next blank entry screen will appear to allow you to add more TBA details.

INCUMBENT FUNDING

ADD FUNDING Hide

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Del	<input type="checkbox"/>	* Chart	CO	* Account	1355400 Budget Office Expenses	Sub Account		* Object	5108 Budget Admin Professional TBA	Sub Object		Position	Z300363 TBA Admin Pro 9 Month	Work Months	9	Pay Months	9	FTE	1	Post	
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Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount
Request:	50000		9	100			
Leave Request CSF: NONE No Leave							
Total Intended:	0				0		

add

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CO, 1355400, -----, 5108, ---, Z60409101, Z300363 Hide

- 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.