Colorado State University
Office of Budgets

Permanent Base Change (PBC) Request Form
Instructions
FISCAL YEAR 2024-2025

Purpose

This form is used to shift permanent base budget between responsibility center (RC) codes for the start of the upcoming fiscal year. This includes reorganizations where programs, people, or responsibilities are permanently moving between organizations outside the College/Division and should be incorporated into the budget allocation process.

Step by Step Process

Completing the form

(Use the "TAB" key to navigate the form)

1. Save the .pdf file to your computer and rename as appropriate.
2. *Complete fields at the top of the form (**Reduce Budget From** and **Increase Budget To**).*
   This is similar to how the budget adjustment process works in the Kuali Financial System (KFS).
   a. RC Code: Responsibility Center Code (i.e. GA = College of Engineering)
   b. College/VP: provide an abbreviation for the college or vice president (i.e. COE = College of Engineering or VPSA = Vice President for Student Affairs)
   c. Dept #: the four (4) digit code used in Kuali (Organization Code).
      Campus Delivery codes and KFS Org Codes are not always the same. Please make sure you are entering the correct four-digit code.
   d. Account #: provide the 7-digit account number, if known.
   e. Contact's Full Name, Email and Phone Number.
3. In the "Description or Explanation" field, provide details of what is occurring and why. Be clear and concise in providing adequate explanation so approvers can easily understand what they are being asked review and approve.
4. Salary Control for Fringe Transfers:
   a. Check the appropriate box indicating if salary control for fringe is to transfer or not. Please select only ONE option, "YES" or "NO", as the form will allow you to select both. If you are uncertain what this means, ask your business officer for guidance or contact the Office of Budgets.
   b. In most cases, if there is salary moving, the salary control for fringe will transfer unless there are circumstances that disallow or the unit transferring the budget does not have the salary control available to transfer. Use the additional comments section at the bottom of the form to explain, as appropriate.
5. Expenditures - Salaries section (1(a-l)):
   a. Under the salaries column, tab or click the salary categories that are applicable to the situation and populate the salary fields along with the associated FTE. The FRINGE and TOTAL categories will be automatically calculated based on the fringe rates displayed on the form and the amounts entered for each category. Budget object codes are displayed within each option for both salaries and non-salary options. **Only use whole dollars!**
6. Expenditures – Non-Salary Expenses (2-9):
   a. Enter any applicable non-salary amounts for categories such as Travel, Operating, Services, Capital Outlay, etc. **Only use whole dollars!**
7. Totals:
   a. Once all sections have been filled out, totals will automatically populate. The calculated total fringe remains in the central fringe pool account but displays for a full picture of costs.
8. Additional Comments:
   a. Include any final thoughts or information pertinent to the budget movement that will be useful to those reviewing, approving and processing the request.

Digital Signatures

Once all portions of the form have been completed, digital signatures are required **for both the TO and FROM sides of the base budget change** and must be saved after each signature.

Note: _You may need to go to your Control Panel > Display and click on Smaller – 100% default button and reboot your computer in order to complete all the steps below._

Digital Signature

1. Click within the appropriate signature field being completed. Once selected, a window will pop up with ADD Digital ID, prompting you to insert a digital signature.
2. A new window will open prompting you to select an existing digital ID used from a prior form, or a new digital ID to be created now. Select "a new digital ID I want to create now". Click "Continue".
3. The next window asks where you would like to store your new self-signed digital ID, either in a "New PKCS#12 digital ID file" or in a "Windows Certificate Store". Please read the descriptions and determine which storage location is more effective for your personal usage. Select your preferred location, and click "Continue".
4. The next screen asks for your personal information needed to electronically sign your name on forms. Proceed to fill out the following sections as:
    a. Name: Your Name
    b. Organizational Unit: Your Department (i.e. Office of Budgets)
    c. Organization Name: Colorado State University
    d. Email Address: Your Assigned CSU Outlook Email Address, select "Next"
    e. Country/Region: Leave as Selected: US – United States
    f. Enable Unicode Support: Leave Unchecked
    g. Key Algorithm: Leave as Selected: 1024-bit RSA
    h. Use digital ID for: Leave as Selected: Digital Signatures and Data Encryption
5. Once all of the categories have been completed, click "Next".
6. The next window will prompt you to create a password to "Sign" your new digital signature with. Make sure it is something secure, but also something you will remember. If you forget your password, a new one cannot be created, and you will have to create an entirely new digital signature. Once your password is entered, click "Next".
7. This will complete the process of creating your digital signature. You are now ready to sign your PBC Request Form.
8. After selecting the proper signature line to sign, select your digital ID from the "Sign As" drop-down menu, enter your password, and click "Sign".
9. Your digital signature will be validated, and that signature line will then be locked, where it cannot be re-signed or changed. The form will then prompt you to create and save a copy of the form.
10. Each time a new signature is added, the form needs to be resaved as a new version to allow the signature to be final.
11. After signing and creating an updated copy with each appropriate signature, complete the corresponding date of signature and save once more, before sending it along to the next person needing to sign.
12. Save and print the document for your records, if desired, and forward to next approval level.

Once all signatures are entered, saved, and dated, please submit the Permanent Base Change (PBC) Request form to the Office of Budgets for final review and processing.

Please email the signed forms in electronic format to Analia.Endrizzi@colostate.edu by **April 30, 2024.**