Implications of eDoc Processing in Relation to Budget Construction

Budget data is built from existing HRMS Job and Position data. When a budget is opened you will find existing appointed employees tied to their positions, just as they are in HRMS, if a candidate job row is found and the appointment funding is flagged for CSF. Budgeted positions without incumbents are identified as vacant in Budget Construction. Any eDoc transactions can proceed as usual.

- While setting salaries in Budget Construction, (i.e., entering a new compensation rate, distributing salary between accounts for an employee currently appointed to a position), do not complete a corresponding eDoc.

- However, if you are changing any attribute of a position, you must complete a Maintain Position eDoc. If the position change is to be reflected in the employee's job record, the update incumbent box must remain checked.

- If you process a Maintain Position eDoc after the PS sync is turned "off" the employee's APA (Annual Pay Adjustment (Budget Load)) will not update the job record. Central office staff will handle the cleanup via load failure reports.

- For a new hire to be reflected in Budget Construction, you must process a Hire eDoc. If the eDoc is processed before the CSF Tracker is frozen, and the effective date is prior to the new fiscal year, the base will automatically be updated in Budget Construction. You can use an effective date prior to and including 7/1/24 for 12-month appointments, and 8/1/24 for 10-month appointments. If the appointment is to have an effective date outside of this range, please budget the position as VACANT.

- If a position is changing from a 12 month to a 10 month, a Maintain Position eDoc must be initiated. Use the effective date of 7/1/24, if the intent is to prohibit the employee from receiving pay for the month of July.

- If an AC1 employee is currently on leave with an expected return date on or prior to 7/1/24, and the employee is definitely returning, you will need to initiate a Return to Duties eDoc. This eDoc must be approved prior to the budget load to enable the individual's APA to load. Staff employee records load regardless of their HRMS leave status (there is no need to return a Staff employee from leave unless he or she has returned).

- An eDoc processed prior to the budget load with an effective date less than or equal to 7/1/24 (12-month appointment) or less than or equal to 8/1/24 (10-month appointment) will be overwritten with the budget load. Therefore, the budget load information becomes the current job information.

- Before the budget load, if you process an eDoc with an effective date in the new fiscal year you will be providing outdated salary information, due to carrying the current salary information forward with an effective date after the budget load.

Once the CSF Tracker is turned off, eDoc changes will no longer automatically update in Budget Construction and will require an interactive update using the Budget Construction application. However, eDocs may still be processed, with the only eDoc transactions being "held" being the ones for which you know that what the budget will load is wrong and you need to insert a row on top of it to cover up the budget data. A legitimate example would be one in which the budget only loads funding by percent and you want the funding to be by amount.

NOTE: When the budget is loaded, all eDocs for AC1, Staff Monthly, and Staff Biweekly employees with a route status of "saved" or "enroute" will automatically be disapproved by the eDoc system the next time they are opened.