

# Budget Manager's

Quick Guide



Welcome to **Budget Manager's Quick Guide**. Within these pages is information to help you accomplish your responsibilities as a budget manager. This guide is intended to give you some basic information you need to start a task. It also provides a link and a contact number to assist in answering additional questions you might have that are outside the scope of this guide.

- How to use your [Budget](#)
- How to understand the [Budget Process](#)
- How to read a [Chart String](#)
- How to use [Creative Services](#)
- How to respond to an [Emergency](#)
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## How to Use Your Budget at VSU

Each department at VSU is granted a budget at the beginning of the fiscal year. It is the responsibility of the Budget Manager to utilize these funds in a way that allows their department to achieve its goals while at the same time adhering to the policies set by the [State, University System of Georgia](#), and the institution that governs the use of these funds. Your budget is your authority to spend and needs to accurately reflect your spending plans. If you have any questions please contact [Budget Services](#) at (229) 333-5710.

In order to use your budget you will need to understand chart strings. Please see the next topic for an explanation of them. Some of the information and forms that will be necessary to successfully perform your budgeting duties are:

- [Excel Budget Tracking Worksheet](#)
- [Personal Services Estimator Worksheet](#)

To access the Financial Data Warehouse, please complete the [user access request](#).

- [Financial Data Warehouse Log In](#)
- [Financial DataWarehouse User Guide](#)

Your budget analyst can help you with many aspects of successful budget management. If you do not know who your budget analyst is, that information can be found through the following link:

- [Budget Analyst Contact by Department](#)

The responsibilities and authority of a Budget Manager include but are not limited to the following:

- Submitting timely Goals and Action plans for their department to accomplish the University's goals as defined by the [Strategic Planning](#) process
- Regularly reviewing the unit's budget(s) and submitting timely amendments as needed
- Ensuring the effective and timely use of budget allocations, consistent with the University's Strategic Goals, while not exceeding the established allocation.
- Adhering to State, USG and institutional purchasing and human resources policies in accomplishing these activities.

Basic Budget Review should include:

- At the beginning of the fiscal year establish an annual plan for the department's activities and estimate what resources and scheduling will be required to accomplish their plans. One tool for the Budget Manager to use is the [Department Budget Tracking Worksheet](#) included with Resources below.
- Review monthly reports, report discrepancies and make timely amendments
- Communicate with department members regarding budget priorities and progress
- Communicate with Dean and/or Vice President to keep them current regarding the changes in needs and the impact for the school's or division's goals
- Meet year-end deadlines for purchases, etc.

When funds need to be moved within a department or across departments in the same fund this can be done through the use of a budget amendment. Funds cannot, however, be moved from one fund to

another. Information on how to fill in a budget amendment as well as the amendment form with examples can be found at the following location:

- [Budget amendment information](#)

### **How to READ A CHART STRING at VSU**

A chart string is the map for where the budget is coming from or going to. There are many places where you will find chart strings such as the schedule G, the schedule G-1, the Business Intelligence Tool, and budget amendments. Each chart string is generally made up of five parts: Fund, Department, Program, Class, and Account. If you are dealing with funds from a grant, there will also be a Project ID in the chart string. One thing to keep in mind while working with chart strings is that budgets are at a different level than transactions. For example, your budget for supplies is on your 700000 line, but the account you would use to order the supplies is 714100. A webpage with further information about chart strings can be found at the following link:

- [Chart strings](#)
- [Accounting](#) : 229-333-5710

### **How to Use Creative Services at VSU**

[Creative Services](#) is an in-house design studio that provides campus clients with assistance using the campus seal and logo in official VSU projects. They handle all of the stationary and mailer printing needs for VSU. Creative Services offers the following help:

[Web Service](#): 229-259-5147

[Video Production Services](#): 229-333-7315

[Printing and Copying Services](#): 229-333-2162

### **How to Respond to an Emergency at VSU**

The Valdosta State [University Emergency](#) App gives a brief overview of what actions students, faculty and staff should take during various types of emergencies, including severe weather, medical emergencies, active shooter, and fires. Click on one of the emergency icons above to access response information for that type of emergency or click here for the full [Emergency Quick Reference Guide](#).

[Emergency App](#)

[University Police](#) : 229-333-7816

[Environmental and Occupational Safety](#) : 229-293-6171

### **How to Use Employee & Organizational Development at VSU**

The Employee and Organizational Development Department is primarily a resource unit to assist employees to achieve University goals, realize career ambitions and enhance personal job satisfaction levels. The Employee and Organizational Department provides ongoing programs to orient, train, and develop employees, thereby improving skill levels, promoting personal career growth, and optimizing employee performance. To see what training is being offered and to register for training you can access their information through the following link:

[Training Information](#)

[Employee & Organizational Development](#): 229-259-5105

## How to obtain a Fuel Card at VSU

A [fuel card](#) is located in every VSU operated vehicle. It must be used to purchase all fuel for the vehicle. To use the fuel card you will need to have a driver ID PIN. The below links will lead you to the application for a driver ID PIN and more information on the use of a fuel card:

- [Driver ID PIN Application](#)
- [Fuel Card Procedures](#)

Upon completion of your travel you will need to log into [PeopleSoft Financials](#) and fill out an Expense Report. This report must be submitted within 60 days of the completion of your travel and can be found under the self-service tab. A hard copy of your expense report along with your receipts for expenses and a copy of your travel itinerary must also be turned in to your travel approver. This person will instruct you as to the procedures your specific office follows for expense reimbursement.

[Financial Services](#) : 229-333-5708

## How to Hire Employees at VSU

It is possible that during your time at VSU the hiring of personnel may be your responsibility. This may include hiring for student employee positions, staff positions, and faculty positions. When hiring a faculty member, you must have preauthorization from the [VP of Academic Affairs](#). For all other employees, please contact [Human Resources](#) before proceeding with any hiring actions. A helpful resource that will walk you through the posting of a job and the hiring process is:

### [People Admin User's Guide](#)

If you have problems accessing this feature of People Admin, it may be because you are not set up with hiring privileges in the system. If you continue to have problems accessing this part of the system contact HR or your Department Head. Before you will actually be able to undergo the process of hiring someone, you must upload a signed budget amendment along with the request to hire someone for a position to PeopleSoft Financials. Once you are ready to post an open position, be sure that you have the correct position number and classification for the position. The position number can be found in the Schedule G-1 at this location:

### [Online Reporting Manager](#)

If you are not sure of the classification of the position, please contact HR for this information.

More information on the requirements that must be followed when hiring employees can be found at the following link:

### [Hiring Process](#)

[Human Resources](#) : 229-333-5709

[VP Academic Affairs](#): 229-333-5950

## How to Use Information Technology at vsu

The [Division of Information Technology](#) provides and supports many of the applications and hardware used every day by students, faculty, and staff at Valdosta State University. Supported technologies include anything from electronic accounts such as email and Banner registration, to office and classroom computers, to wireless Internet and printing. IT delivers a number of end-user services by providing a front-line helpdesk, technicians, self-help resources, and training. The Helpdesk can be accessed through email or phone.

[helpdesk@valdosta.edu](mailto:helpdesk@valdosta.edu)

[IT Helpdesk](#): 229-245-4357

## How to Mail at VSU

VSU maintains a campus-wide mailing address for all incoming mail and packages. Deliveries will be made to each department on a daily basis. Mail being sent out by each department will be picked up at the time the daily delivery occurs. [Campus Mail](#) will affix postage to all official VSU mail as long as it has a VSU return address and a plus four code from the sending department. All letters and packages must be accompanied by the following form:

[Letter and Package Form](#)

Further information on the services offered by and the regulations of the Campus Mail Department can be found at the following link:

[Campus Mail](#)

The official mailing address of VSU is as follows:

1500 N. Patterson St.  
Valdosta, GA 31698

Remember to add the plus four of your department to the 31698-XXXX zip code. If you do not know the plus four code for your department, please contact Campus Mail.

[Campus Mail](#) : 229-333-5672

## How to Get Started Online at VSU

VSU uses many online systems to conduct day-to-day business. These systems will require you to have Active Directory and/or Employee Self Service access. If you need help with Active Directory please contact [Information Technology](#). If you need help with Self Service please contact [Human Resources](#).

Information Technology: 229-245-4357

[Human Resources](#) : 229-333-5709

## How to Use Payroll at VSU

[Payroll](#) at VSU is handled on either a monthly or bi-weekly basis. The frequency of an employee's pay is determined by their job code. Bi-weekly employees start their pay period at 12:01 am Saturday and it runs for fourteen consecutive days ending at 11:59 pm Friday. Pay dates for both monthly and bi-weekly employees are listed on the Employee Payroll website. If you are asked to review/approve leave accruals you should receive a notification when the leave reports are available from [Human Resources](#). This report is used to reconcile employee's annual and sick leave. If you feel that you should be getting this notification and are not, please contact your department head or [Human Resources](#). Information on the eTime and on-line Time Clock systems that are used to track employee work hours can be found on the Payroll website. If you think you should be approving time for payroll but do not have access to do so through these systems, please contact [Human Resources](#). Any other questions you or your employees may have concerning their pay, hours worked, or benefits can be directed to [Shared Services](#).

- [eTime and On-line Time Clock](#)
- [Shared Services](#)
- [Employee Payroll](#)

[Payroll](#) : 229-333-5710

[Shared Services](#) : 1-855-214-2644 helpdesk@ssc.usg.edu

[Human Resources](#) : 229-333-5709

## How to Use Physical Plant and Facilities Planning at VSU

Occasionally things will need repair or maintenance in your department. [Physical Plant's](#) responsibilities include the operation of the campus utility systems, maintenance of roads and grounds, as well as building maintenance and custodial services to academic, administrative, and other University facilities. Should you find yourself in need of their services, you must submit a [Work Order Request](#). When submitting this request you will need to know the building and room number where the service is needed. If you have an emergency need for custodial services, you may submit your request to Work Management between the hours of 8:00 am and 4:30 pm. After hours emergencies are handled through [Public Safety](#).

[Physical Plant and Facilities](#) : 229-333-5875

[Work Management](#): 229- 333-4860

[Public Safety](#): 229-259-5555

## How to Find Policies and Procedures at VSU

The [Human Resources](#) department at VSU maintains an [Administrative Practices Manual](#). This manual contains information on employee benefits, leave, payroll, and many other pertinent subjects. The manual can be accessed through the following link:

- [VSU Human Resources Administrative Practices Manual](#)
- The Board of Regents also has a policy manual that may be helpful. It can be found at the following link:
- [Board of Regents Policy Manual - University System of Georgia](#)
- [Valdosta State University Policies](#)
- Human Resources: 229-333-5709

## How to Obtain and Use a Purchasing Card at VSU

- To obtain a purchasing card you must first read the Purchasing Card Procedures. [Purchasing Card Procedures](#)
- Then you must complete and submit the Online Purchasing Card Orientation. [VSU Purchasing Card Online Orientation](#)
- Finally, you will need to print and complete the Purchasing Card Application and send the completed form to Procurement & Contract Services. [Purchasing Card Application](#)

- For more information about the use of the purchasing card and access to the tools that will allow you to successfully use your purchasing card please follow the link below:  
[Purchasing Card Information](#) Courtney Stone, Procurement Card Manager 229-245-4393  
[Procurement and Contract Services](#) : 229-333-5708

## **How to Purchase Supplies and Other Items at VSU**

The Department Head or the Budget Manager for each department will determine who is granted shopping and requesting privileges in their area. Once an employee has been granted these rights, they will need to determine which method of obtaining their purchases is most appropriate. If an item is available through the [Central Warehouse](#), it must be purchased there. If it is not available through the Central Warehouse, the next place to check its availability is through state and agency contracts and state mandatory sources. These resources can be found through the following links:

[Georgia Enterprises for Products and Services \(GEPS\) Mandatory Items](#)

If an item or service is not available from any of the state approved sources, it is considered an open market purchase. Open market purchases that do not exceed \$5,000 may be made using a purchasing card. Purchases that do exceed \$5,000 must be subjected to a bidding process.

The following link contains further information about the purchasing requirements at VSU:

[Purchasing Guidelines](#)

[eProcurement](#) is a module in PeopleSoft Financials that creates electronic requisitions and routes them for approval. The GeorgiaFIRST Marketplace is an online shopping site that is accessed through PeopleSoft Financials. Through this portal you can shop for contract items from state and institution approved vendors. After you have made your purchasing choices and have placed the desired items into an online shopping cart, purchasing will turn your cart into a purchase order. If you desire to cancel all or part of an order that has already been sent to purchasing, that action can only be done by a buyer. To facilitate a cancellation of an order you must contact purchasing through their email address:

- Catherine Storey email: [cfstorey@valdosta.edu](mailto:cfstorey@valdosta.edu)
- Teresa Arnold email: [tearnold@valdosta.edu](mailto:tearnold@valdosta.edu)
- Heather Craft email: [hcraft@valdosta.edu](mailto:hcraft@valdosta.edu)

[Procurement & Contract Services](#) : 229-333-5708

Before making any purchasing choices, it is vitally important that you ensure there is sufficient budget available to cover your purchases. You must confirm the budget availability by checking your 700000 line of your budget for purchases less than \$5,000 and the 800000 line for purchases of \$5,000 or more. ePro will check for available budget before letting the order through to processing. If there is a lack of available funds your order will not go through. More information on eProcurement and GeorgiaFirst Marketplace can be found through the following link:

[Procurement & Contract Services](#) : 229-333-5708

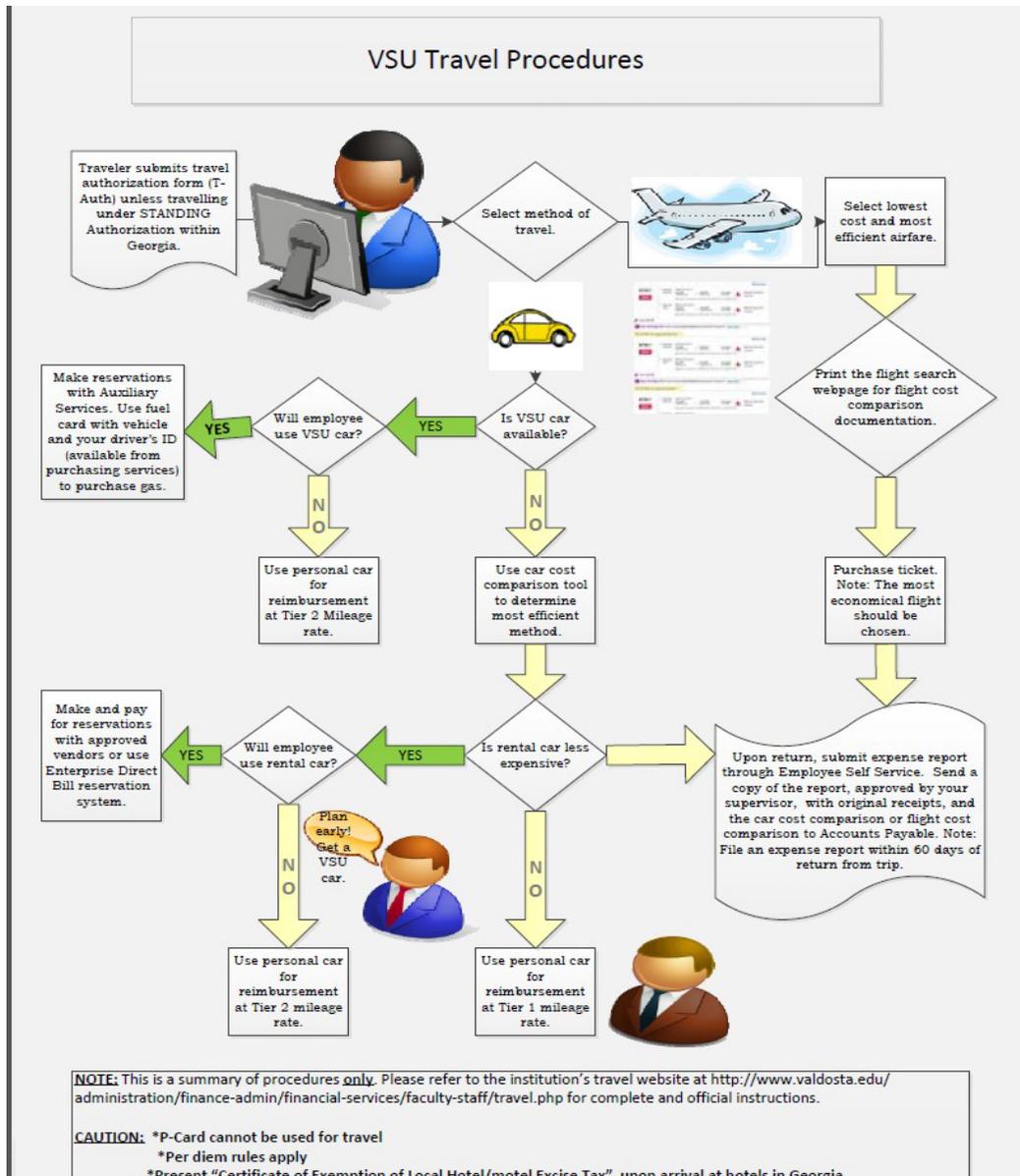
## **How to Travel at VSU**

Before arranging for any travel, be sure that there is sufficient budget available to cover the expense. The amount of available budget can be checked by looking at your 600000 line. Information on travel procedures that must be followed at Valdosta State University can be found at this location:

[Travel Guidelines](#).

Some of the forms and websites you will need are linked below from the [Travel](#) website:

- [Travel Authorization Form](#)
- [Travel Cost Comparison - Car](#)
- [Georgia Government Vehicle Liability Insurance Identification Card](#)
- [Georgia State Tax Exemption Certificate](#) This is required to be provided to all hotels used during your VSU authorized travels.
- [Prepaid Conference Registration](#)



## **How to Use Web Services at VSU**

Part of the responsibility of a Budget Manager is ensuring the department website is maintained and kept up to date. VSU uses the Cascade program to achieve this goal. In order to be able to use Cascade, you must first attend a training class.

[Register for Cascade Training](#)

[Web Services](#): 229-333-7315

## **How to Find More Information to Help You be Successful at VSU**

In the course of your job duties you may have additional questions. The resources listed below may be helpful in answering those questions.

- [Board of Regents Academic Affairs Handbook](#)
- [University System Academic Advisory Committee](#)
- [VSU Faculty Handbook](#)
- [Council On Staff Affairs \(COSA\)](#)
- [Frequently Requested Contact Information](#)