

## **Instruction and General (I&G) Permanent Funded Position Changes**

**General Description:** I&G funding is an appropriation funded by the State. It is the responsibility of the Budget Office to ensure that the University stays within the I&G appropriated amount without exceeding the budget authority for permanently funded positions. The permanently funded positions are generally funded from year to year at same salary amount unless an increase is approved during the year or for the beginning for a new year.

**Purpose:** To provide the Colleges/Departments a question and answer on how the I&G permanent position salaries are monitored and how changes affect the unit's position line items, operational indices and salary pools.

### **How are I&G Permanent Salary Funds moved by the Budget Office?**

As unit/colleges use their I&G funding throughout the year, the Budget Office will move permanent increases/decreases to and from the unit/college designated salary pools. Using a single I&G source, allows unit/colleges to track their I&G salary funds and to plan funding future I&G positions changes.

### **How to Fund I&G Permanent Position Salary Changes with Unit/College I&G Funds?**

As funds from the unit/college salary pools are depleted to fund salary budget changes, the unit/college initiating position changes will need to ensure as part of their planning that the pools are replenished from other I&G sources or vacant positions. The unit/college may also choose to fund position changes as they occur from other I&G funding sources or vacant positions in advance of the increase/decrease coming from/to their salary pools. Other I&G funding sources that the unit/college would like to use other than the designated salary pools may be specified through PeopleAdmin actions or the Faculty Request Forms. If these forms are not being used to make changes to regular I&G positions by the unit/college, an email identifying the I&G funding source should be sent to [position@nmsu.edu](mailto:position@nmsu.edu). This will ensure the appropriate sources are used for these changes as per the unit/colleges.

### **Units/Colleges Funding Multiple Positions from Various Funding Sources**

The unit/college may choose to use multiple sources of funding to fund changes to regular I&G positions. This will usually occur for reorganizations or for when the unit/college is using multiple funding sources or vacant positions to fund I&G position changes. These changes will not typically occur at one time and may take place over several months to a year to completely be processed. As unit/colleges are planning for these changes, the Budget Office asks these be sent in email in advance of the PeopleAdmin actions/Faculty Request Forms to help speed up the process with Budget Office approval as well as to ensure the correct funding sources are used.

The best way to communicate these changes is in a table that lists the positions, a description of changes, and funding sources.

### **I&G Salary vs. Operational Indexes**

When using I&G funding to fund positions, there are salary and operational funds. Salary funds have fringes in a centrally maintained fund (See Fringes documentation). The department may use salary indexes to move funds for increases/decreased with I&G positions. I&G Operational funds are used by the department for other expenses that are not salaries. If a department chooses to use operational funds to fund salary increases, fringes will need to be included at the current fringe rates. The salary amount plus the fringes for that amount will be taken out from the operational index and transferred over to a salary index and the exhibit's fringe index. Each year the new fringe rates are estimated based on the balances in the salary indexes/funds.

### **PAF/EPAF/LPAF Changes Affecting I&G Salary Budgets**

Forms PAF/EPAF/LPAF, which may have important information about salary budget changes to positions do not route to the Budget Office. Since many of these changes may be non-permanent or non-I&G. The Budget Office will not be informed of the changes that are initiated by the unit/college through this process.

Below are examples of I&G **permanent** position changes that may occur in NBAJOBS through PAF/EPAF/LPAF and that may require the I&G salary budget to be adjusted in NBAPBUD. These changes will require the unit/college to inform the Budget Office at [position@nmsu.edu](mailto:position@nmsu.edu):

- **Org changes** (will be verified with the departments before they are changed by the Budget Office)
- **Labor distribution changes to NBAPBUD** (will only be updated by an email from the department)
- **Retention/Equity/Base** (will be covered by the pool unless the unit/college informs the Budget Office in advance of other funding sources)
- **FTE change** (will be verified with the departments before they are changed by the Budget Office)

Emailing the Budget Office as these changes above are initiated by the unit/college will assure the changes and funding sources are applied appropriately.

### **How to Save Time with Permanent I&G Salary Budget Change Approvals**

Most salary budget changes to positions are initiated through a PeopleAdmin action or Faculty Request forms. This is the best time for units/colleges to let the Budget Office know how they would like to fund requested salary increases/decreases if not coming from the salary pool.

Below is a detailed description where these can be noted. By doing the following, this will save time for approval and ensure the funding used for the position changes are as the unit/college specify.

**PeopleAdmin Actions** – If there are **permanent** changes to existing regular staff positions processed through PeopleAdmin, then the unit/college should identify the funding source in the comment section, Budget Details, or Funding Detail section at this time. If there is an approved document/memo identifying the funding source, this may be attached to PeopleAdmin, and will suffice as well as long as all the pertinent information needed is identified.

Budget Details	
Funding Type	I&G I&G
Requested Budget/Salary	I&G \$37,777
Identify Source of Funding	I I&G dept salary pool
Funding Details	
If using multiple indexes, total percentage must equal 100%.	
Index	100372
Fund	110000
Percentage	100

*1 Picture of PeopleAdmin form sections Budget Details and Funding Details*

**Faculty Position Request Form** – If there are **permanent** changes to existing regular faculty positions processed through the Faculty Position Request Form, then the unit/college should identify the funding source under the permanent funding section where it states, “If I&G, provide additional funding source.” If there is an approved document/memo identifying the funding source, this may be emailed to the Budget Office at [position@nmsu.edu](mailto:position@nmsu.edu), and will suffice as well as long as all the pertinent information needed is identified.

		Faculty Position Request Form LOG #: _____	
<b>Completed form should be submitted to MSC 3445 or Hadley Hall, Room 220</b>			
<b>FACULTY Change/New position request</b>			
<b>1. Requested Action</b>			
<input type="checkbox"/> Attribute changes to a <b>VACANT</b> Position**		<input type="checkbox"/> New position	
<small>** Changes to a FILLED faculty position are processed using other forms (LRF, P&amp;T, PAF)</small>		Date: _____ / _____ / _____	Position Number: _____
<b>2. Current/NEW Position Information</b>			
Position Title: <u>Select from drop-down list</u>		Position FTE: _____	
Rank: <input type="checkbox"/> Instructor <input type="checkbox"/> Assistant Professor <input type="checkbox"/> Associate Professor <input type="checkbox"/> Professor		Budgeted Salary: _____	
Tenure: <input type="checkbox"/> Non-Tenure Track <input type="checkbox"/> Tenure Track		Org Number: _____ Org Name: _____	
Type of appointment: <input type="checkbox"/> Academic (9 month) <input type="checkbox"/> Annual (12 month) <small>** Research positions can only be 12 month.</small>			
Reports to Position Number: _____		Reports To Position Title: _____	
<b>3. Requested Position Changes (Leave blank if requesting a NEW position)</b>			
Position Title: <u>Select from drop-down list</u>		Position FTE: _____	
Rank: <input type="checkbox"/> Instructor <input type="checkbox"/> Assistant Professor <input type="checkbox"/> Associate Professor <input type="checkbox"/> Professor		Budgeted Salary: _____	
Tenure: <input type="checkbox"/> Non-Tenure Track <input type="checkbox"/> Tenure Track		Org Number: _____ Org Name: _____	
Type of appointment: <input type="checkbox"/> Academic (9 month) <input type="checkbox"/> Annual (12 month) <small>** Research positions can only be 12 month.</small>			
Reports to Position Number: _____		Reports To Position Title: _____	
<b>4. Permanent Funding</b> – *changes to funding source or hiring org can be requested directly to <a href="mailto:position@nmsu.edu">position@nmsu.edu</a>			
Funding Type: <input type="checkbox"/> I&G <input type="checkbox"/> Non I&G (unrestricted) <input type="checkbox"/> Non I&G (restricted)			
Index: _____ Fund _____ % _____	Index: _____ Fund _____ % _____	Index: _____ Fund _____ % _____	
If I&G, provide source for additional funding: _____			
<b>5. Contact Information (cannot be a temporary employee)</b>			
Name: _____	Phone: _____	Email: _____	
1. Department Head Approval: _____		Date _____	
2. Dean/Vice President Approval: _____		Date _____	
3. Executive Vice President and Provost Approval: _____		Date _____	
<b>Comments</b>			
<b>Position Maintenance (Provost Office Use Only)</b>			
PCLS: _____	PCLS Title: _____	Position Group Code: _____	CIP Code: _____
ECLS: _____	Position Title: _____	NORC: _____	

2 Faculty Position Request Form I&G funding source section highlighted.

## I&G Funded Position Changes

The table below shows actions affecting salary increases and decreases for I&G positions with a description of who is responsible for funding or keeping the savings.\*

Who Covers the Change?	Central	Unit or College*	Real Entry (BD02)**	Additional Information
<b>Non-Exempt</b>				
Degree, Service, Longevity, & Probation	✓		Yes	
Centrally Conducted Equity Reviews	✓		Yes	Central review are conducted by HR.
Department Conducted Equity Increase		✓	Yes	
Reclassification Increase/ Decrease		✓	Yes	
FTE Increase/ Decrease		✓	Yes	Requires justification. The percent of I&G funds must match the percent of labor effort.
New Hire Increase/ Decrease & Promotion	✓		Yes	
Base (up to scale)	✓		Yes	
Negotiated Union Contract	✓		Yes	
Vacants**	✓		Yes	Additional salary budget above entry will move to the central staff pool.
Eliminating Position***		✓	Yes	
<b>Exempt</b>				
Degree	✓		Yes	
Centrally Conducted Equity Reviews	✓		Yes	Central review are conducted by HR.
Department Conducted Equity Increase		✓	Yes	
Reclassification Increase/ Decrease		✓	Yes	
FTE Increase/ Decrease		✓	Yes	Requires justification. The percent of I&G funds must match the percent of labor effort.
New Hire Increase/ Decrease & Promotion		✓	Yes	
Base (up to scale)	✓		Yes	Only if initiated by central.
Vacants Above Midpoint Salary Level**	✓		Yes	Additional salary budget above midpoint will move to the central staff pool.
Vacants Below Midpoint Salary Level		✓	No	Will only be adjusted at the time the position is filled. Savings will be kept by the department (between entry and midpoint).
Eliminating Position***		✓	Yes	
<b>Faculty</b>				
Degree	✓		Yes	
Centrally Conducted Equity Reviews	✓		Yes	
Department Conducted Equity Increase		✓	Yes	
FTE Increase/ Decrease		✓	Yes	Requires justification. The percent of I&G funds must match the percent of labor effort.
New Hire Increase/ Decrease		✓	Yes	Must receive Provost approval for all faculty salary increases. Decreases will go to the department faculty pool if the salary has already been adjusted to the market salary level. <i>Reference the provost.nmsu.edu for the Faculty Recruitment and Hiring Procedures for more information.</i> Asst/Asse Dean and Acad Dept Head: Salary offers for new hires may be up-to the last incumbent's salary.
Base (up to scale)		✓	Yes	
Vacants	✓		Yes	Faculty positions are compared with market salaries and any salary savings will be moved to the PFPF for redistribution by the Provost. Salaries below market are not adjusted. <i>Reference the provost.nmsu.edu for the Faculty Recruitment and Hiring Procedures for more information.</i>
Eliminating Position***		✓	Yes	All funds will stay with the College.
Promotion/Tenure	✓		Yes	Annual Promotion/Tenure process conducted through the Provost Office.
<b>Police</b> The following applies to Police Officer, Deputy, Supervisor and Commander, and Chief and Asst Chief positions. All other personnel will follow the non-exempt/exempt table above.				
Degree, Service, Longevity, & Probation	✓		Yes	
Centrally Conducted Equity Reviews	✓		Yes	
Department Conducted Equity Increase		✓	No	
Base (up to scale)****	✓		Yes	
FTE Increase/ Decrease		✓	Yes	Requires justification. The percent of I&G funds must match the percent of labor effort.
New Hire, Reclassification, & Promotion		✓	No	
Vacants		✓	No	
Eliminating Position***		✓	No	

\*The Budget Office will use the department/college designated salary pool index for all salary budget changes. Another source of funding (index) can be provided by the department to the Budget Office in advance by email or through the PeopleAdmin request. When the salary change occurs in Banner or when the PeopleAdmin request is routed to budget for position salary budget changes/approvals, at that time the department should inform the Budget Office of the funding source if different than the designated salary pool index. It will be the responsibility of the department/college to ensure these pools do not go into a negative and permanent funds are transferred immediately to cover any shortages.

\*\*Real Entry - The full amount of the permanent budget adjustment that occurs July 1st of the upcoming fiscal year will be completed when the position status changes in Banner. For Central funding sources, a one-time budget adjustment is completed for the current year to cover what is needed for the remainder of the year. Departments are responsible for one-time savings adjustments for their indexes.

\*\*\*The UBC (University Budget Committee) has not approved the use of staff and faculty positions salary for operations.

\*\*\*\*Police positions paid under the alternative compensation program are identified by the salary table on NBAPOSN where the salary table value is "PS" or "PH."