

Creating Budget Entity (BE)

Overview

This instructional guide identifies the steps for creating a Budget Entity (BE) in People First.

Definitions

The following are definitions relevant to this instructional guide:

- Budget Entity – Sub-component of the FLAIR Account Code. This code is used to drive agencies budgets.
- DMS/People First Team – The entity within the Department of Management Services that is responsible for strategic planning and procurement management; contract management and service center oversight; system and data warehouse design; customer support, communication and training as it relates to the People First system.
- Mass Load – A systematic way to process certain position and employee actions in People First. A minimum of 100 records are required in order to process a mass load.

Process Steps

Only the DMS/People First Team or the People First Service Center/Org Management Team can create a Budget Entity in People First. The DMS/People First Team has the primary responsibility for creating Budget Entities, and the Org Management Team serves as backup.

Step 1: Create New Budget Entity (BE) in People First

- Send request to have Budget Entity created in People First to the DMS/People First Team. A request to create a new Budget Entity must be made at least two business days before the BE is needed. Requests are normally processed the same day as the request is received.
 - Requests should be submitted to Cheri Van Gundy at Cheri.VanGundy@DMS.MyFlorida.com and should include the Budget Entity code, the BE description (limited to 40 characters, including spaces) and effective date. If more than 10 new Budget Entities are being created, the data should be submitted using the [Budget Entity Template](#).
 - DMS/People First Team will notify the agency once the Budget Entity has been created.

Step 2: Create SPC to BE Relationship for New Budget Entity

- Each new Budget Entity must be linked to the appropriate State Program Component before it can be used in People First.
- Send request to have SPC and BE relationship created in People First to the DMS/People First Team. A request to create a new SPC to BE relationship must be made at least two business days before it is needed. Requests are normally processed the same day as the request is received.
 - Requests should be submitted to Cheri Van Gundy at Cheri.VanGundy@DMS.MyFlorida.com using the [SPC to BE Relationship Template](#).

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- DMS/People First Team will notify the agency once the SPC to BE relationship has been created.

Step 3: Update Organization Unit (State Org Financial Data)

- If applicable, once the new Budget Entity **and** SPC to BE relationship have been created, assign (as default) the Budget Entity to an Organization Unit in People First.

Step 4: Update Position Records

- Once the Budget Entity has been created, and the FLAIR Account Code has been marked (activated) for payroll, update all positions (Position Funding screen) in People First manually (direct entry) or through the mass load process.
 - If processing as a mass load, the agency provides data to DMS/People First Team using the established template (*Position Funding Template*). Requests should be submitted to Cheri Van Gundy at Cheri.VanGundy@DMS.MyFlorida.com.