TRAX (PeopleSoft)

MONTHLY NEWSLETTER   **JULY, 2009**

Departmental Adjustment / Budget Change Request Q&A

Q: Under what circumstances should I enter a Departmental Adjustment Request?

A: Departmental adjustment requests are used for two primary purposes: 1) to "recode" charges posted to one department or account that should have been charged to a different department or account and/or 2) to charge departments for services rendered (i.e. rental of facilities; AV services provided).

Q: Is this the same as a Budget Change Request?

A: No. A Budget Change Request, or BCR, is used to move budgeted funds between departments *before* the expense takes place. A departmental adjustment request is used to "recode" an expense from one department to another *after* the transaction has taken place.

Q: I want to split the cost of an event with another department on campus. How should this be handled?

A: In the event that your department needs to "reimburse" another department on campus for a shared expense or event, you should submit a BCR to cover your share of the expense.

Q: Who should initiate a departmental adjustment request if it will need to be approved by two or more departments?

A: The policy is that the department receiving the money should begin the process.

Q: What if I am confused and don't know which form to enter… what do I do?

A: Contact the TRAX Hotline at x8704 or contact the Budget Office or Accounting directly. Describe your situation and we'll be able to tell you which form to submit.

Q: How do I get access to enter departmental adjustment or budget change requests?

A: Please contact Amy Alexander at x8705 or via email at Amy_E_Alexander and make plans to attend the appropriate training session. To see a schedule of upcoming training events, please visit: https://www1.baylor.edu/pod_reg

TRAX (PeopleSoft)

Monthly Newsletter

TRAXHelp

Not sure who to contact about a particular charge that shows up on your Detail Report? The TRAXHelp website has a listing, organized by code, of individuals to contact about those charges. This list can be found by visiting www.baylor.edu/traxhelp > *Documentation* > *Who To Contact.* You can also access the list directly by clicking here.

Additionally, you can contact the TRAX hotline at x8704. The TRAX hotline is available Monday through Friday, 8-5.

TRAX Security Requests

If you have security requests for TRAX or need additional department security authorizations, please direct those requests to TRAX@baylor.edu or to Amy_E_Alexander@baylor.edu.   Please be aware that, for audit purposes, written documentation is required for all security changes.

New Users

If you know someone who needs to obtain a TRAX (PeopleSoft) user ID, please have them go to the Getting Started link on the TRAXHelp website and follow the instructions there.

TRAX Training

TRAX training classes are scheduled through the end of August. A list of TRAX classes is now available on the TRAXHelp website.   Classes for the summer months will be forthcoming. To sign up for training, please visit the Professional Development Seminar Online Registration page. If you have difficulty signing up for TRAX training, contact TRAX@baylor.edu.

Need Help?

TRAX Hotline

710.8704

www.baylor.edu/traxhelp

trax@baylor.edu

Questions
Self-Service Help ▶▶▶
Answers