COMBO CODES USER GUIDE

If you have questions about information in this user guide, please contact Financial Reporting and Accounting Services.

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Background

- The PeopleSoft Human Resources system uses combo codes to represent the chartstring, rather than typing out each individual chartfield value. Each combo code is associated with a distinct chartstring.

- Once a combo code has been created, the chartstring can no longer be modified. This is to preserve the data and maintain consistent reporting.
Create a Combo Code

Combo codes for the payment of salary and wages using chartstrings other than sponsored projects are not created automatically by the system when a user does a budget transfer. Combo codes are automatically created for 15 specific accounts when a F5000 budget for sponsored projects is set up. This is done with a system interface that runs twice daily. If combo codes for sponsored projects are needed for accounts other than the 15 created automatically, they can be created as outlined below. There is no ability to edit an existing combo code. A new combo code needs to be created any time salary or wages are set up using a new chartstring.

Step-by-Step Instructions: Creating a Combo Code

1. Log in to PeopleSoft through the Financials Login (www.uvm.edu/~erp/portal).

2. Navigate to: Main Menu > UVM Modifications > FSMOD031 Create Combo.

3. Click the ADD button.

4. Type in the chartstring for which to create a combo code.

   NOTE: Since combo codes are used only for payroll-related transactions, the account must start with 5; you will get an error message if it doesn’t. A combo code is not needed for fringe accounts (59910, 59912, 59914, and 59916). There must be a corresponding E-Level budget if the fund is an operating fund that requires one. You will get an error message if no E-Level budget exists on the chartstring for the account selected.
5. Click **Check Budget**. This will ensure that a budget exists for the chartstring. Users cannot create a combo code until a budget exists for the chartstring.

6. Upon clicking **Check Budget**, the following page will appear:

![Commitment Control](image)

7. Click on the **Budget Check** button. The budget checking process will run.

8. When the process is done running, the area shaded green in the graphic above will either indicate that the budget check returned a **Valid** status, or that there was an **Error**.

   **NOTE**: If a **Budget Warning** message, that is okay - treat it as a valid status.
9. If the status is valid, click the OK button to return to the original page. Then click the **Create Combo Code** button. It will process for a bit and then the combo code will appear. If one already exists, it will return the existing combo code.

10. This is the message that appears for a new combo code, or if the combo code already exists:

<table>
<thead>
<tr>
<th>Status: New ComboCode Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>000101728</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status: Valid Existing ComboCode</th>
</tr>
</thead>
<tbody>
<tr>
<td>000101728</td>
</tr>
</tbody>
</table>

**Budget Checking Errors when Creating Combo Codes**

If there is a budget checking error, the combo code cannot be created. This could be for one of several reasons:

- No budget is set up for the chartstring.
- The chartstring is for a grant on which spending is controlled, and it is over budget.
- The chartstring is for a grant and the current date is outside of the date range specified for the grant.
- The chartstring is closed.

**Understand Budget Checking Errors**

1. If there is a budget checking error, the error message below will appear. Click **OK**.

```
Budget Checking Errors Exist (18021,91)

Budget checking errors were logged for this document. Please check the budget exception page to view them.
```

OK
2. The following message will be returned:

```
Budget Checking has logged 'Error' Exceptions. Do you want to Transfer to the Exceptions? (18021,1031)
Selecting "Yes" will transfer you to the Transaction Exception Panel for this document while refreshing and minimizing the calling panel.
Selecting "No" will refresh the panel.
You can transfer later by using the "Go to Transaction Exception Header" Push Button on this secondary panel.

Yes    No
```

3. Click No. The Commitment Control Details for the combo code will appear again.

![Commitment Control Details](image)

4. Click on the Go to Transaction Exceptions link to view an explanation of the error. In so doing, users will leave the combo code create page. To go back to the combo code create page after following the transaction exceptions link, users can click the back button in the browser - which is not typically a good idea- but it is the best option for this situation.

   **NOTE:** If clicking the back button brings users to a page that says - page has expired, click the back button a second time.

5. Upon return to the page pictured above, click on OK or Cancel to return to the combo code set-up page. Users can then change the chartstring if it needs to be adjusted, or leave this page and start over later, after the budget issue is resolved.
Frequently Asked Questions

What are combo codes?

Combo codes are used in the Human Resources module where they serve as shortcuts to chartstrings. Each chartstring is associated with a unique combo code that is created by the system.

Why do I need to create a combo code?

The HR system uses combo codes to represent the chartstring, rather than typing out all of the individual chartfield values. Combo codes are only used in the HR system.

Do I need a combo code for the benefit expense accounts (59910, 59912, 59914, and 59916)?

No, users do not need combo codes for the benefit expense accounts. The benefit expenses are calculated based on the account used for the payroll expense. For example, if the expenses are for staff payroll, account 52000 is associated with account 59910 which is for the full benefit rate.

How can I look up a combo code?

In the HR system, use the following navigation to look up combo codes: Set Up HRMS > Common Definitions > ChartField Configuration > Combination Code Table. Search by various parts of the chart string or by the combo code number.

Resources

Here are links to related resources, classes, and policies:

- Chart of Account Spreadsheets
- Professional Development & Training Classes
- University Policies and Operating Procedures

This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.