



FY24 SOM Budget Planner Kick-off Meeting

March 13, 2023

Timeline for FY24 Budget Build

- FY24 Budget Build Timeline

- ❖ 3/1/23 – FIBCI System Opens
- ❖ 3/13/23 – Salary & Budget Planner Open
- ❖ 3/18/23 – NM Legislative Session Ends
- ❖ 3/24/23 – Shared Salaries Finalized in Salary Planner
- ❖ 3/30/23 – Requests due to FSM for MSU
- ❖ 4/12/23 – HSC Guidelines Released
- ❖ 4/17/23 – Salary & Budget Planner Lock for SOM
- ❖ 4/19/23 – Salary & Budget Planner Lock for HSC
- ❖ 5/1/23 – SOM FIBCI System Closes
- ❖ 5/8/23 – Signed SOM FIBCI's/FCP's due to HSC CFO

- SOM Lock Dates

- ❖ 3/28/23 – Non-Clinical
- ❖ 3/30/23 – Small Clinical
- ❖ 4/4/23 – Medium Clinical
- ❖ 4/6/23 – Large Clinical

- HSC Non-SOM Lock Dates

- ❖ 4/14/23 - HSC Admin/PPD/UNMMG
- ❖ 4/17/23 – HSC CON/COP/HSLIC

- Working Sessions

- ❖ 3/14/23 – 3/31/23

Budget Planner System

Salary
Planner



Budget
Development



Budget
Planner

Shared Salaries

- Definitions:
 - Shared Org – Department who pays for salaries of employees outside of their organization
 - Home Org – Hiring Organization for an employee, who is responsible for updating the labor distribution for employees in Salary Planner
- Shared Salary Process
 - SOPs and Contact List
 - MyReports – F HSC Reports – FSRSLSH Shared Salary
 - Shared Salary Reports sent to Home Departments – 2/6/23
 - Shared Salary Reports sent back from Home Departments – 2/24/23
 - Shared Salary Agreements finalized – 3/13/23
 - Shared Salaries finalized in Salary Planner – 3/24/23

Access Links to Salary Planner

- Employee Tab

Student Financial Aid **Employee** Payment Finance Department Forms

Search Go

Employee

[Employee Dashboard](#)
Pay Stubs, Job Summary, Leave Balances, Earnings and Deductions History

Direct Deposit
View and update your direct deposit information. You will be prompted to login using [Azure MFA \(mult](#)

New Employee Checklist
New Employees, please complete all items immediately.

Personal Information
View/Update Personal and UNM Directory Information

Benefits and Deductions
Retirement, Health, Flexible Spending, Miscellaneous, Beneficiaries, Benefit Statement, VEBA Opt-Out

Jobs Summary
List of Jobs and Associated Transactions

Tax Forms
Form W-4, Form W-2, Form 1095-C

Make Bursar Payments
Pay Bursar billed insurance, parking tickets, etc. by credit card, checking or savings account.

Time Sheet (Approvals and View Only)
Departmental Time Entry Approvals and View

Electronic Personnel Action Forms
Employee Transactions and Labor Distributions

[Effort Certification & Labor Redistribution](#)
The Banner 8 versions of Effort Certification (EC) and Labor Redistribution (LR) no longer function

[Salary Planner](#)
Update Position Budgets, Job Salary and Labor Distribution for the Upcoming Fiscal Year

- Finance Tab

Student Financial Aid Employee Payment **Finance** Department Forms

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Budget Planner Menu

Create Budget Development Query
Review Budget Development phase information by account or organization.

Create Budget Worksheet
Update Budget Development phase information via a budget worksheet.

Create Projected Actuals Worksheet
Create financial projections through current fiscal year end via a projected actuals worksheet.

Maintain Organization Lock
Lock or unlock Budget Development phase organization locks.

Budget Development Reports Menu (old)
View Budget Development reports.

Budget Development Reports Menu
View Budget Development reports

Projected Actuals Reports Menu (old)
View Projected Actuals reports.

Projected Actuals Reports Menu
View Projected Actuals reports

[Salary Planner Menu](#)
Update Position Budgets, Job Salary and Labor Distribution for the Upcoming Fiscal Year

Edit Scenario in Salary Planner Menu

Student Financial Aid **Employee** Payment Finance

Search Go

Salary Planner

- Edit Scenario**
Update salary planner scenario information.
- Organization Lock
Lock or unlock salary planner organization locks.
- Query Multiple Extracts
View multiple salary planner scenarios by organization.
- Salary Planner Reports Menu
View Salary Planner reports.
- Budget Planner Menu
Update or review Budget Development phase information, Manage phase organization locks, or view Budget Development reports.

RELEASE: 8.8.3

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Student Financial Aid **Employee** F

Search Go

Edit Scenario

Choose Extract ID and Scenario, then select filter

Scenario Selection

Extract ID: 12FAC24 ▼

Scenario: 12FAC23 12FAC24 ▼

Filter Criteria

By Position

By Employee

Select

NM THE NEW MEXICO

Extract ID:	Scenario:
12FAC24	12_MO_FACULTY_24
9FAC24	9_MO_FACULTY_24
HSTAFF24	HOUSESTAFF_24
RSTAFF24	REG STAFF_24
POOL24	POOLED_POSITIONS_24
CSTAFF24	CONTRACT_STAFF_24
CWA24	CWA_BARG_UNIT_24
USUNM24	USUNM_BARG_UNIT_24

Only use Scenarios ending in "24" for this budget cycle!

Filter Criteria

By Position Attributes:

By Employee Name:

Select

Position Filters

Student Financial Aid **Employee** Payment Finance Department Forms

Search

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

Update of Budget Development

Chart of Account: U
Budget ID: BUD24
Budget Phase: ADOPTD

RSTAFF24, REG STAFF 24

Organizations:
013A - Continuing Medical Educ Department
013B - Continuing Med Educ Gen Admin

Include Subordinate Organizations:

Employee Class:
SE - Exempt Staff
SN - Non-Exempt Staff

Bargaining Unit:
None

Faculty Rank:
None

Include Pooled Positions:

Include Vacant Positions:

Number of Records per Page: 100

JOB VS. POSITION

Job = HR

- Employee's Salary on July 1
- Tied to a specific person
- Name and ID appear in System

Position = Budget

- Placeholder in Budget
- Can be an open position
- Position number and title appear in System

Name and ID: NAME 100111222
 Position-Suffix and Title: S08718-00 Financial Analyst
 ...RAE Transaction #:

Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent
U	043479	3U0044	043J	2020	P111	GNACTV				100.00
Total										100.00

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent
U	043479	3U0044	043J	2020	P111	GNACTV				
Total										

Add New Record

Proposed Position Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent
U	043479	3U0044	043J	2020	P111	GNACTV				100.00
Total										100.00

Budget Distribution for Position S08718 Financial Analyst.

Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent
U	043479	3U0044	043J	2020	P111	GNACTV				100.00
Total										100.00

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent
U	043479	3U0044	043J	2020	P111	GNACTV				
Total										

Add New Record

Current Incumbent

Name and ID: NAME 100111222
 Position-Suffix and Title: S08718-00 Financial Analyst

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent
U	043479	3U0044	043J	2020	P111	GNACTV				100.00
Total										100.00

Matching Job & Position

Job Labor Distribution

Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

Name and ID: [Redacted]
 Position-Suffix and Title: [Redacted]
 EPAT Transaction #: 150251

Current

COA Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	
U	730005	2U0224	730B3	2020	P131	GNACTV			50.00	48,475.40	
U	738001	3U0044	738A	2020	P131	GNACTV			50.00	48,475.40	
									Total	100.00	96,950.79

Proposed

COA Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Del
U	730005	2U0224	730B3	2020	P131	GNACTV			50.00	48,475.40	X
U	738001	3U0044	738A	2020	P131	GNACTV			50.00	48,475.40	X
									Total	100.00	96,950.79

Add New Record

Check Index & Account Code

Proposed Position Distribution

COA Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	
U	730005	2U0224	730B3	2020	P131	GNACTV			50.00	48,476.00	
U	738001	3U0044	738A	2020	P131	GNACTV			50.00	48,476.00	
									Total	100.00	96,952.00

Save

Copy Position Distribution to Job

Copy Job Distribution to Position

Only valid FY24 indices can be entered into the system!

If they are not valid the nightly refresh process will drop the index.

Last refresh will be 4/19/23

Distributions must equal 100% on both Job and Position sides!

Zero Out A Job

Example: If an employee is separating before July 1st, but the position needs to be budgeted for a replacement

List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

[Jump to Bottom](#)

013B Continuing Med Educ Gen Admin, Locked, Updateable

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals				Change Percent	Change Amount	Proposed Job Salary	Ex Sta
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary					
	S09333 - 00 Coord, Education Support	100.00	36,420.80	100.00	100.00	36,420.80	-100.00	-36420.80	0.00		

Remember to enter comments to explain why the job and position do not match!

Zero Out A Position

Example: If there is an open position that will not be filled, so it should not be budgeted

my **UNM**

Back to Employee Life Tab

LoboMail UNM Learn Calendar Groups Logout

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023A - SOE Mechanical Engineering, Locked, Updateable

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Proposed Job Salary	Links	Extract Status	Exclude from Totals
FY0160 Research	100.00	100.00	0	0	.00	.00	.00	.00		.00	Distribution Comments Employee		<input type="checkbox"/>
	100.00	.85	.85		102,479.00	0.00	0.00	102479.00		117,971.00	Distribution Comments Employee		<input type="checkbox"/>
FY1101 Research Asst Professor	100.00	100.00	.5	.5	48,900.00	-100.00	-48900.00	0.00		.00	Distribution Comments Employee		<input type="checkbox"/>
FY1607 Research Asst Professor	100.00	100.00	0	0	.00	.00	.00	.00		.00	Distribution Comments Employee		<input type="checkbox"/>
Total:			1.35	1.35	151,379.00	.00	.00	151,379.00		117,971.00			

Summary

Organization	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget
023A - SOE Mechanical Engineering			1.35	1.35	151,379.00	.00	.00	151,379.00

FTE should be zeroed out as well!

Change In Salary

Example: Employee receives Career Ladder during Salary Planner refresh process

List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

Mass Change

Hourly or Salary:

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

Mass Apply

[Jump to Bottom](#)

013B Continuing Med Educ Gen Admin, Locked, Updateable

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals							
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Job Salary	Extract Status	Excluded from Totals
	S09333 - 00 Coord, Education Support	100.00	36,420.80	100.00	100.00	36,420.80	.00	.00	36,420.80		
	S04847 - 00 Program Manager	100.00	57,607.03	100.00	100.00	56,201.98	2.50	1,405.05	57,607.03	Changed	
Total:						92,622.78	1.52	1,405.05	94,027.83		

Make changes on both Job and Position sides!

Add comments for any changes being made in system!!

Changes in FTE

Example: Faculty increasing FTE from .75 to 1.0 FTE

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals			Change Percent	Change Amount	Proposed Job Salary	Extract Status	Excluded from Totals
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary					
		100.00	53,485.00	75.00	100.00	39,127.00	35.83	14,023.00	53,157.00	Changed	

Example: 4 students at .25 FTE each hired into one Pooled Position

Budget Detail for Position UB0139 #Student Entry Level

Model:	Proposed	Base	Current
Fiscal Year Budget:	30,000.00	.00	.00
FTE:*	1	0	0
Appointment Percent:	100.00	100.00	100.00
Total Salaries:			
Estimated Fiscal Year Budget:	.00		
Exclude from Totals:	<input type="checkbox"/>		

Position
Organization: 160B - Family Community Medicine FCM
Type: Pooled

IMPORTANT!!

Review ALL FTE data for both Job and Position

Failure to update FTE causes reporting to be inaccurate for the School

Changes in Appointment Percentage required approved EPAF

Salary Planner Reminders!!

- Faculty salary reflected in Salary Planner must equal contract salary as reflected on the FY24 FIBCI/FCP
 - Contract Salary = Base + Supplement
- Faculty Incentive – Not required to enter into Salary Planner!
 - Enter Incentives, Faculty Call, and Extra Shifts directly into Budget Planner with account code 20FI
- If an employee is on any Restricted awards, then you must budget on both sides in order to get to 100% distribution
 - Does not impact Grant budget
 - If Restricted Index is ending before June 30th , use shell index from MSU
- There should not be two employees in the same position
 - Will need to contact Employment Area to have corrected
- If there is a position available in Salary Planner to use for budget then utilize that first!
 - Do not use 20SA in Budget Planner if a position is already in Salary Planner

Salary Planner Reports



Salary Planner Reports Menu

Salary Planner Working Report

Reports Salary Planner information by index within organization.

Salary Planner Exception Report

Reports Salary Planner updates that do not adhere to salary increase rules.

Vacant Position Report

Reports vacant positions by organization.

Salary Planner Position Working Report

Reports Salary Planner Position information by index within organization.

NEW REPORTS!!

Run in PDF or Excel!



UNIVERSITY OF NEW MEXICO Salary Planner Working Report for 2023 - 2024 Organization: 997A - Pediatrics; Index: - ; Fund: - Scenario: ALL; Include Vacant Positions: Yes

Account	Employee Name	Position, Suffix, Title	Hiring Org	Posn Budget	Current Labor Distribution	Proposed Labor Distribution	Distribution	FTE	Change Amt	Change %		
					Index % Amount	Index % Amount	Amount					
	Andrews,Emily	(101889981) FY0958-00 Clinician Ed-Assist Prof	997H	0	R 9973HZ	20.00%	18,972	R 9973HZ	20.00%	18,972	0	0.00%
					R 9973JD	14.00%	13,280	R 9973JD	14.00%	13,280		
					R 9973JC	66.00%	62,608	R 9973JC	66.00%	62,608		
						100.00%	94,860		100.00%	94,860		
	Vacant Position	S02917 Advanced Practice Provider	997K5	0	R 9972NC	100.00%	0	R 9972NC	100.00%	0	0	0.00%
						100.00%	0		100.00%	0		
	*Vacant Position	S06716 Fiscal Services Tech	523K	0	R 043499	100.00%	1	R 043499	100.00%	1	0	0.00%
						100.00%	\$1		100.00%	\$1		

Budget Development

- UNM Budget Office SOPs
 - <https://budgetoffice.unm.edu/budget/index.html>
 - Adjust Index Budgets
 - Step by step for accessing the system, and how to adjust Budget by Index
 - SOPs for All Reports
- Working Sessions (3/14/23 – 3/31/23)
 - Email with Dates, Times, and Zoom links
 - One on One trainings available by request

- Creating Budget Worksheet in Budget Planner
 - Budget ID : BUD24
 - Budget Phase: ADOPTD
 - Check all boxes

Student Financial Aid Employee Payment **Finance** Department Forms

Search Go

Create Budget Worksheet

Chart, Budget ID, Phase, Fund, and Organization are required. Program and Account may use wildcard (None), and account types to include in the worksheet.

Chart of Accounts	U	Budget ID	BUD24	Budget Phase	ADOPTD	Budget
Account Index	52305G	Program	P222	Activity	523D0G	
Fund	3U0034	Location				
Organization	523D0					

Display Fin Mgr from: None

Check to Include:

- Revenue Accounts
- Labor Accounts
- Expenses
- Deleted Items

Save Query as:

Shared

Submit

Budget Development Business Rules

- All indices with current Unrestricted funds must be budgeted
 - No budget in an index = NO SPENDING!
- Index budgets must net to zero
 - Budgeted Revenues – Budgeted Expenses = 0
- **Target Net Margin is \$0**
 - Budgeted Use of Reserves – 1901
 - Only use if index has available reserves
 - Only use if approved by Dean's Office
 - Comments are required for any budget in account code 1901

Budgeting Allocations and Transfers

- Allocations and Transfers must be budgeted on both sides
 - To and From must be budgeted in each index and tie to each other
 - MyReports (FORITAH – HSC Transfer Allocation Report) – helps determine what account codes to use
- Internal Allocations (16xx) must net to zero by fund
 - Run Budgeted Account Code report by fund to check
- External Allocations and Transfers between departments
 - Work together to make sure both sides are budgeted for same amount
- Comments are required for ALL transfers and external allocations
 - Comments should include: To/From index, account code, amount, and brief description

Budgeting Salary and Incentive Adjustments

Salary Adjustments

- Account code 20SA
 - Used as budget placeholder for faculty and staff positions
 - Normally be 20XX, 2020, 2040, 2060, etc.
 - Moving Expense for Faculty
 - Comments are required!!
 - Comments need to explain totals in detail
 - Include: Position, account code, and amount
 - Example: 20SA budgeted for \$110,000

Budget Development Text

Enter Budget Text, Print:

Admin Asst 3, 2060, \$40,000
Prog Coord, 2040, \$60,000
Faculty Moving expense Dr. B, 2000, \$10,000

Faculty Incentive Adjustments

- Account code 20FI
 - Used as budget placeholder for faculty incentive, call, and extra shifts
 - Normally 2005, 200G, 200H
 - Comments are required!!
 - Comments need to explain totals in detail
 - Include: Faculty, account code, and amount
 - Example: 20FI Budgeted for \$500,000

Budget Development Text

Enter Budget Text, Print:

Incentive for Dr. B, 2005, \$10,000 (monthly)
Incentive for Dr. K, 2005, \$10,000 (one-time)
Diy Chief Incentives, 2005, \$25,000 (5 @ \$5K)
Faculty Call, 200H, \$300,000 (weekend call)
Extra Shifts, 200G, \$155,000

20FI	Faculty Incentive Adjustments
20SA	Salary Adjustments

SOM Budget Files

- SOM Budget Folders
 - SOM Finance will send departments schedules for certain items to tie to when building budget
- Allocations & Transfers Schedule
 - Due back to SOM Finance on or before the department's lock date
- SOM FY24 Budget Closeout Checklist
 - List of reports to run for baseline, during review, and final
 - List of specific account codes to run reports for and double check
 - SOM departments are required to submit completed checklist to SOM Finance on or before their lock date



Questions?

- Contact Information
 - SOMFinance@salud.unm.edu
 - HSC Budget Office
 - Christina Lounsbury – clounsbu@salud.unm.edu
 - Phillip Smith – plsmith@salud.unm.edu
 - HSC Faculty Contracts Office
 - Krickett Marquez – krmarquez@salud.unm.edu

