# FY21 BUDGET BUILD KICKOFF BUDGET PLANNER OVERVIEW

MARCH 17, 2020

# THINGS TO REMEMBER

WE'RE IN THIS TOGETHER

WE'LL ACCOMPLISH OUR GOALS

DEADLINES REMAIN THE SAME

WE'RE ASKING, AS MUCH AS POSSIBLE, COMPLETE WORK FROM HOME

# PRIORITIES THIS WEEK

COMPLETE FIBCI CONVERSION FOR FACULTY

SUBMIT CONVERTED INCENTIVE WORKSHEET  TO NICOLE , THIS IS NEEDED TO COMPLETE ALL DEPARTMENT ALLOCATIONS

WORK TO COMPLETE SHARED SALARY SO ALL UNITS CAN OPTIMIZE THEIR TIME

# WORK FROM HOME ADJUSTMENTS

SALARY PLANNER AND BUDGET PLANNER ARE WEB BASED AND DO NOT REQUIRE SPECIAL CONNECTIVITY

MYREPORTS WILL NOT RUN WITHOUT A VPN CONNECTION. THOSE WITH VPN ACCESS SHOULD NOT DEPEND ON IT TO BE AVAILABLE, A SURGE IN USE WILL LIMIT YOUR ACCESS AND SLOW YOU DOWN

# WORK FROM HOME ADJUSTMENTS

WE'LL SEND YOU LEVEL 5 REPORTS THROUGH FEBRUARY, 2020

1)     SHARED SALARY

2)     UNRESTRICTED BALANCES BY INDEX

3)     OPERATING LEDGER SUMMARY INCLUDING PRIOR YEAR THROUGH JUNE 2019

ADDITIONAL REPORTS/INFORMATION
1)     DEAN'S ALLOCATIONS
2)     STATE FUNDING LETTERS
3)     F&A
4)     SPENDING DISTRIBUTION
5)     GEOGRAPHICAL MEDICAL DIRECTORS
6)     TARGET MARGIN IS BREAKEVEN-UNLESS ALREADY NOTIFIED OTHERWISE

# HELPFUL HINTS BEFORE YOU BEGIN

**1.** **NEW USERS OR NEW TO DEPARTMENT?** Refer to New User System Overview (slide 58). You need to make sure you have access to your department's budgets before you can proceed.

**2.** **NEED TO BUDGET A NEW INDEX?** If you haven't already requested new indices, now is the time! Otherwise they will not be available in Budget and Salary Planner!

**3.** **DON'T SEE THE DATA YOU ARE EXPECTING OR SOMETHING LOOKS OFF ON WORKSHEETS OR REPORTS?** Always make sure you are in the right budget year – BUDGET ID should be **BUDGET21** and BUDGET PHASE should be **ADOPTD.**

# HELPFUL HINTS BEFORE YOU BEGIN

**4. REPORTS SEEM OFF FROM WHAT YOU'VE ENTERED?** Verify you are not filtering on a specific fund, sub-org or program. If you filter at any point, the system will continue to filter your information until you removed the filter from your parameters.

**5. REMEMBER! ALL INDICES MUST NET TO $0!**

You are making adjustments in Budget Planner. The system will automatically pull and budget last year's budget numbers, unless you make the adjustments needed.

# SOM LOCK DATES

## MARCH 25TH

**NON-CLINICAL**
*AND*
**SMALL CLINICAL:**

ACADEMIC AFFAIRS
ADVANCEMENT / OCF
BASIC SCIENCES
CIDI
CLINICAL AFFAIRS
DERMATOLOGY
ECHO
EDUCATION
LEO
NEUROLOGY
NEUROSURGERY
OMI
RESEARCH
RESEARCH EDUC
SUPPORT
WELLNESS

## MARCH 30TH

**MEDIUM  CLINICAL:**

ANESTHESIOLOGY
DENTAL MEDICINE
EMERGENCY MED
FCM
OB/GYN
ORTHOPAEDICS
PATHOLOGY
RADIOLOGY

## APRIL 3RD

**LARGE  CLINICAL:**

CANCER CENTER
INTERNAL MEDICINE
PEDIATRICS
PSYCHIATRY
SURGERY

# Overview Objectives

**Timeline**
- Critical events and dates

**Process & System Overview**
- Shared Salaries
- Salary Planner Overview
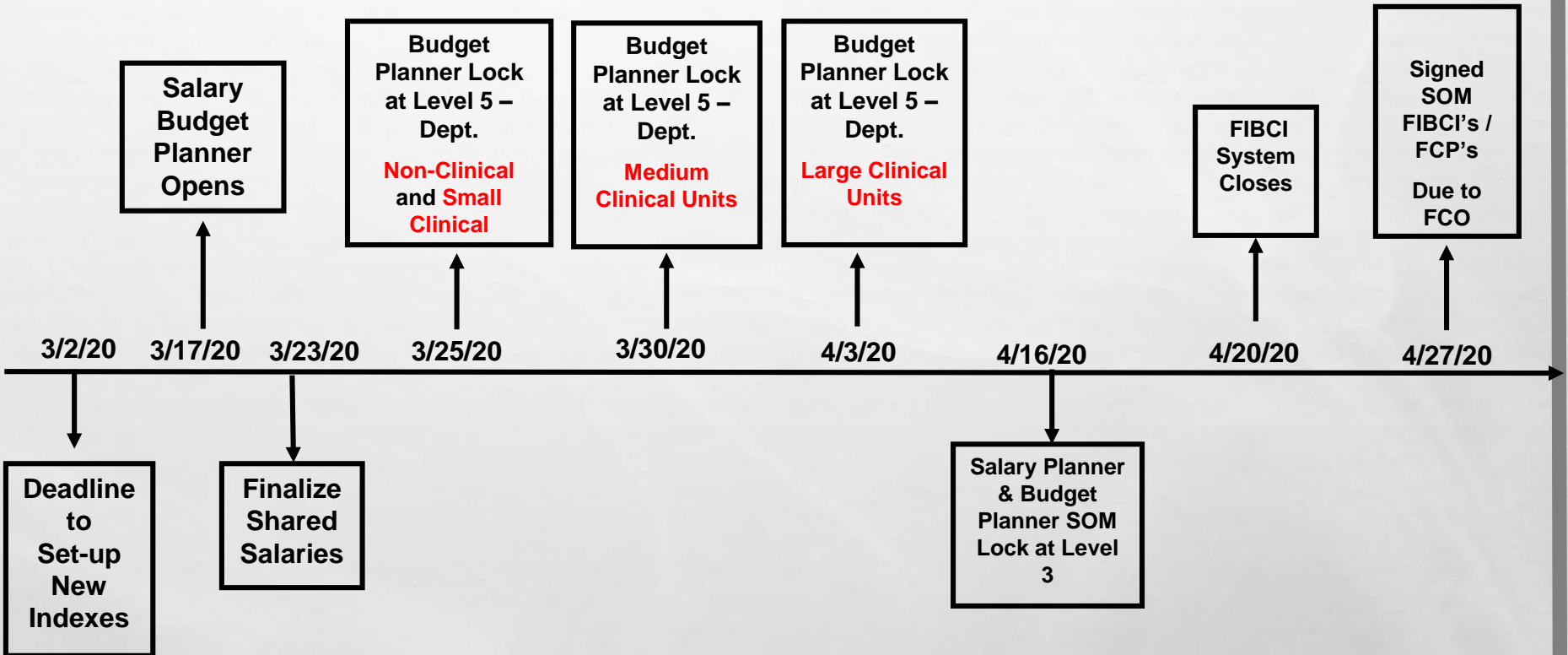- Budget Development Business Rules
- Key points and reminders

**Resources**
- Contacts and Online Resources

**New Users**
- Budget Planner Overview / Refresher

# TIMELINE FOR FY21 BUDGET BUILD

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Salary Budget Planner Opens** | | **Budget Planner Lock at Level 5 – Dept.** **Non-Clinical and Small Clinical** | **Budget Planner Lock at Level 5 – Dept.** **Medium Clinical Units** | **Budget Planner Lock at Level 5 – Dept.** **Large Clinical Units** | | **FIBCI System Closes** | **Signed SOM FIBCI's / FCP's Due to FCO** |

3/2/20    3/17/20    3/23/20    3/25/20    3/30/20    4/3/20    4/16/20    4/20/20    4/27/20

**Deadline to Set-up New Indexes**

**Finalize Shared Salaries**

**Salary Planner & Budget Planner SOM Lock at Level 3**

# HSC NON-SOM UNITS LOCK DATES

- HSC Administration / PPD / UNMMG     April 9th

- HSC CON/COP/HSLIC                           April 13th

# CONTACTS

SOM FINANCE
| | | | |
|---|---|---|---|
| KRISTIN GATES | 272-8189 | | KGATES@SALUD.UNM.EDU |
| THERESA KELLEY | 272-4987 | | TKELLEY@SALUD.UNM.EDU |
| THERESE SEARS | 925-2471 | CELL: 505-816-8662 | TSEARS@SALUD.UNM.EDU |
| SYLVIA MCCLEARY | 272-0592 | CELL: 505-249-0131 | SMCCLEARY@SALUD.UNM.EDU |
| YVETTE HALL | 272-5065 | CELL: 505-507-3797 | YHALL@SALUD.UNM.EDU |
| SARAH MARTINEZ | 272-0454 | CELL: 505-328-1737 | SMARTINEZ@SALUD.UNM.EDU |
| NICOLE DOMINGUEZ | 272-8096 | CELL: 505-550-9797 | NDOMINGUEZ@SALUD.UNM.EDU |

HSC BUDGET OFFICE
| | | |
|---|---|---|
| JOSEPH WROBEL | 272-5664 | JWROBEL@SALUD.UNM.EDU |
| DESIREE GATHINGS | 272-0904 | DGATHINGS@SALUD.UNM.EDU |
| CHRISTINA LOUNSBURY | 272-5492 | CLOUNSBU@SALUD.UNM.EDU |

HSC FACULTY CONTRACTS OFFICE
| | | |
|---|---|---|
| MARIE CHESTNUT | 272-2260 | MCHESTNUT@SALUD.UNM.EDU |

# VIRTUAL LAB WORKING SESSIONS

## Sessions Available by Phone

- Monday, March 23$^{rd}$            1:00 pm – 3:00 pm
- Tuesday, March 24$^{th}$          10:00 am -  Noon
- Thursday, March 26$^{th}$         1:00 pm – 3:00 pm
- Friday, March 27$^{th}$            10:00 am – Noon

Yvette 505-507-3797 or Nicole 505-550-9797

# Faculty Contracts Office (FCO)

**SOM FIBCI** (FY21 opened for entry February 17th - closes on April 20th)
- Signed FIBCI's due to HSC FCO **April 27, 2020 at 5:00 PM**

**COP FIBCI** (FY21 opened for entry February 17th - closes on May 11th)
- Signed FIBCI's due to HSC FCO **May 18, 2020 at 5:00 PM**

**CON FCP** (FY21 opened for entry February 17th - closes on May 11th)
- Signed FCP's due to HSC FCO **May 18, 2020 at 5:00 PM**

**Remember!  Salary reflected in Salary Planner <u>must</u> equal contract salary (Base plus Supplement) as reflected on the FY21 FIBCI/FCP.**

# Shared Salaries

- **Must be finalized between departments by March 23, 2020**

# Overview

- Why A Shared Salary Process?
  - Objective
- Who will benefit from this process?
  - Departments with Shared Salaries
- Department Tools
  - Report and Template
- Timeline

# Shared Salary Process Objective

- To Provide Departments with standardized tools – Department contact list, shared salary report, and template

- To encourage a systematic communication and collaboration between departments with shared salaries

- To Reduce Number of indices thrown out of balance in the Budget Planner system after shared department deadlines

| Home Org Desc | Home Org | Acct | Employee | Position | Suffix | Fun Type Desc 2 | Shared Index | % | Annual Salary | Budget Amount | Revised Labor Distribution % | Revised Job Annual Salary Proposed | Revised Total Budgeted to Index | Note | Revised Labor Distribution % | Revised Job Annual Salary Proposed | Revised Total Budgeted to Index | Note |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Index Organization Level 5 : 997A-Pediatrics** | | | | | | | | | | | | | | | | | | |
| College of Nursing | AFD | 2000 | UNM Employee | FY1063 | 00 | CR HSC | 9972AJ | 10.00 | 100,000.00 | 10,000 | | | | | | | | |
| College of Nursing | AFD | 2000 | UNM Employee | FY0469 | 00 | CR HSC | 9972AC | 13.04 | 141,800.00 | 18,491 | | | | | | | | |
| College of Nursing | AFD | 2000 | UNM Employee | FY0599 | 00 | CR HSC | 9972AJ | 10.00 | 100,000.00 | 10,000 | | | | | | | | |
| College of Nursing | AFD | 2000 | UNM Employee | FY0723 | 00 | CR HSC | 9972AJ | 15.00 | 118,800.00 | 17,820 | | | | | | | | |
| Anthropology Department | 045A | 2000 | UNM Employee | FY2369 | 00 | CR HSC | 9972DS | 43.34 | 52,500.00 | 22,754 | | | | | | | | |
| COP Pharmacy Practice & Admin Scien | 511A | 2000 | UNM Employee | FY0802 | 00 | CR HSC | 9972AC | 22.53 | 111,491.47 | 25,119 | | | | | | | | |
| COP Pharmacy Practice & Admin Scien | 511A | 2000 | UNM Employee | FY0802 | 00 | CU HSC | 997197 | 22.52 | 111,491.47 | 25,108 | | | | | | | | |
| COP Pharmacy Practice & Admin Scien | 511A | 2007 | UNM Employee | FTW073 | 00 | CR HSC | 497459 | 32.00 | 35,079.87 | 11,226 | | | | | | | | |
| COPH Deans Office | 304A | 2000 | UNM Employee | FE0137 | 00 | CR HSC | 9972F4 | 3.00 | 260,000.00 | 7,800 | | | | | | | | |
| CRTC Population Sci Academic Unit | 099Z1 | 2020 | UNM Employee | S09546 | 00 | CR HSC | 9972F4 | 20.00 | 60,919.38 | 12,184 | | | | | | | | |
| Medical Oncology | 099S1 | 2000 | UNM Employee | FY1424 | 00 | CU HSC | 9972ET | 24.73 | 228,866.00 | 56,599 | | | | | | | | |
| Dispute Resolution | 398A | 2020 | UNM Employee | S09739 | 00 | CR HSC | 9972CJ | 8.34 | 45,000.00 | 3,753 | | | | | | | | |
| Dispute Resolution | 398A | 2020 | UNM Employee | S09739 | 00 | CR HSC | 9972CK | 8.33 | 45,000.00 | 3,749 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY2189 | 00 | CR HSC | 9972F4 | 5.00 | 96,000.00 | 4,800 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY1512 | 00 | CR HSC | 497459 | 100.00 | 33,861.52 | 33,862 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY2331 | 00 | CR HSC | 9972F4 | 15.00 | 87,450.59 | 13,118 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY0790 | 00 | CR HSC | 9971PF | 5.00 | 105,478.74 | 5,274 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY0790 | 00 | CR Main | 9971VV | 5.00 | 105,478.74 | 5,274 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY0848 | 00 | CR HSC | 9972DR | 4.80 | 195,999.08 | 9,408 | | | | | | | | |
| Family Community Medicine FCM | 160B | 2000 | UNM Employee | FY0848 | 00 | CR HSC | 9972DS | 4.80 | 195,999.08 | 9,408 | | | | | | | | |
| HS Library and Informatics Ctr | 483A | 2040 | UNM Employee | S01644 | 00 | CU HSC | 997590 | 100.00 | 46,115.16 | 46,115 | | | | | | | | |
| IM Div of Epidemiology | 851H | 2000 | UNM Employee | FY1060 | 00 | CR HSC | 9972F4 | 20.00 | 100,000.00 | 20,000 | | | | | | | | |
| Neurology Child | 490C | 2000 | UNM Employee | FY0596 | 00 | CR HSC | 9972CK | 10.00 | 222,634.76 | 22,263 | | | | | | | | |
| Neurology Child | 490C | 2000 | UNM Employee | FY0411 | 00 | CR HSC | 9972CJ | 1.00 | 176,942.06 | 1,769 | | | | | | | | |
| Neurology Child | 490C | 2000 | UNM Employee | FY0411 | 00 | CR HSC | 9972CK | 69.00 | 176,942.06 | 122,090 | | | | | | | | |
| Neurology Child | 490C | 2000 | UNM Employee | FY0411 | 00 | CR HSC | 9972CM | 1.00 | 176,942.06 | 1,769 | | | | | | | | |
| OB-GYN Maternal Fetal Medicine | 794D | 2020 | UNM Employee | S08909 | 00 | CR HSC | 9972CP | 10.00 | 72,000.00 | 7,200 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY0382 | 00 | CU HSC | 997117 | 25.00 | 207,153.00 | 51,788 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY1128 | 00 | CR HSC | 9972CK | 15.00 | 97,100.00 | 14,565 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY0821 | 00 | CU HSC | 997117 | 12.50 | 196,097.00 | 24,512 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY0821 | 00 | CU HSC | 997994 | 12.50 | 196,097.00 | 24,512 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY2667 | 00 | CR HSC | 9972GK | 10.00 | 81,000.00 | 8,100 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY0447 | 00 | CU HSC | 99706Y | 50.00 | 81,000.00 | 40,500 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY0447 | U1 | CU HSC | 99706Y | 50.00 | .00 | 0 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY2541 | 00 | CR HSC | 9972D2 | 50.00 | 20,500.00 | 10,250 | | | | | | | | |
| Psych Child Adolescent Div C A | 451C | 2000 | UNM Employee | FY2543 | 00 | CR HSC | 9972DM | 100.00 | 20,500.00 | 20,500 | | | | | | | | |
| Psych Community Behavioral Health | 451E | 2000 | UNM Employee | FY0040 | 00 | CR HSC | 9972GK | 1.00 | 101,000.00 | 1,010 | | | | | | | | |
| Psych Community Behavioral Health | 451E | 2007 | UNM Employee | FTW010 | 00 | CR HSC | 9972CK | 100.00 | 8,913.25 | 8,913 | | | | | | | | |
| Psych Community Behavioral Health | 451E | 2020 | UNM Employee | S09194 | 00 | CR HSC | 9972GK | 5.00 | 51,249.92 | 2,563 | | | | | | | | |
| Psych Community Behavioral Health | 451E | 2060 | UNM Employee | S08649 | 00 | CR HSC | 9972GK | 25.00 | 19,379.88 | 4,845 | | | | | | | | |
| Psych Neuropsychology | 451H | 2000 | UNM Employee | FY0753 | 00 | CU HSC | 9971F8 | 3.28 | 131,796.00 | 4,323 | | | | | | | | |
| Psych Neuropsychology | 451H | 2000 | UNM Employee | FY0669 | 00 | CR HSC | 9971WI | 30.00 | 52,400.00 | 15,720 | | | | | | | | |
| Psych Neuropsychology | 451H | 2000 | UNM Employee | FY0669 | 00 | CU HSC | 9970S3 | 30.00 | 52,400.00 | 15,720 | | | | | | | | |

**997A Employee Count: 34**

# FSRSLSH-HSC Salary Planner Shared Salaries

## Index Organization Level 5 :'997A' Fiscal Year: 2017

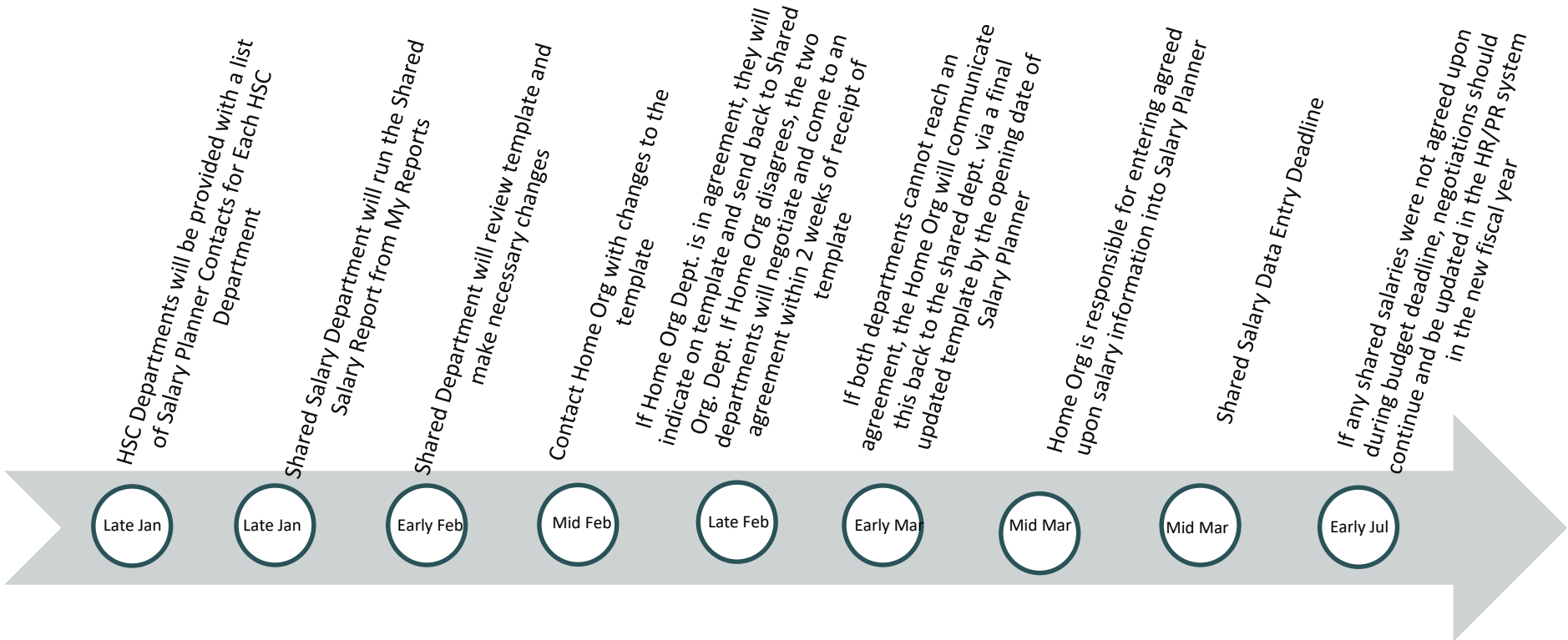| Home Org Desc 6 | Home Org 6 | Annl | Employer | Position | Suffi | Pos Type Desc 2 | Shared Index | % | Annual Salary | Budget Annual | Revised Labor Distribution % | Revised Job Annual Salary Proposed | Revised Total Budgeted In Index | Rate | Revised Labor Distribution % | Revised Job Annual Salary Proposed | Revised Total Budgeted In Index | Rate |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

### Index Organization Level 6 : 4971–Pediatrics Occupational Therapy

| | | 2887 | UNM Employer | FTW873 | 00 | CR HSC | 497459 | 92.00 | 55,875.87 | 11,225 | | | | | | | | |
| Family Community Medicine FCM | 1589 | 2888 | UNM Employer | FY1512 | 00 | CR HSC | 497459 | 100.00 | 55,864.52 | 55,862 | | | | | | | | |

**497I Employee Count: 2**

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# FSRSLSH-HSC Salary Planner Shared Salaries

## Index Organization Level 5 :'997A' Fiscal Year: 2017

| Home Org Desc 6 | Home Org 6 | Annl | Employer | Position | Suffi | Pos Type Desc 2 | Shared Index | % | Annual Salary | Budget Annual | Revised Labor Distribution % | Revised Job Annual Salary Proposed | Revised Total Budgeted In Index | Rate | Revised Labor Distribution % | Revised Job Annual Salary Proposed | Revised Total Budgeted In Index | Rate |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

### Index Organization Level 6 : 997B–Pediatrics Administration Division

| | | 2848 | UNM Employer | S84544 | 00 | CU HSC | 997558 | 100.00 | 46,115.16 | 46,115 | | | | | | | | |
| OB GYN Maternal Fetal Medicine | 734D | 2828 | UNM Employer | S88585 | 00 | CR HSC | 9972CP | 10.00 | 72,000.00 | 7,200 | | | | | | | | |
| Pediatric Cardiology | 997D | 2888 | UNM Employer | FY2426 | 00 | CR HSC | 9972CH | 3.50 | 252,200.00 | 8,919 | | | | | | | | |
| Pediatric Cardiology | 997D | 2888 | UNM Employer | FY8871 | 00 | CR HSC | 9972CH | 2.58 | 268,000.00 | 6,700 | | | | | | | | |
| Pediatric Cardiology | 997D | 2888 | UNM Employer | FY8768 | 00 | CR HSC | 9972CH | 1.62 | 248,000.00 | 5,000 | | | | | | | | |
| Pediatric Cardiology | 997D | 2888 | UNM Employer | FY1248 | 00 | CR HSC | 9972CH | 1.92 | 249,275.00 | 2,845 | | | | | | | | |
| Pediatric Cardiology | 997D | 2828 | UNM Employer | S85725 | 00 | CR HSC | 9972CH | 4.28 | 185,842.85 | 4,411 | | | | | | | | |
| Pediatric Critical Care | 997F | 2888 | UNM Employer | FY2288 | 00 | CU HSC | 997558 | 58.00 | 80,000.00 | 48,400 | | | | | | | | |
| Pediatric Endocrinology | 997I | 2887 | UNM Employer | FTW866 | 00 | CR HSC | 9972C0 | 1.00 | 53,427.00 | 534 | | | | | | | | |
| Pediatric Endocrinology | 997I | 2828 | UNM Employer | S88424 | 00 | CU HSC | 997745 | 100.00 | 78,557.84 | 78,557 | | | | | | | | |
| Pediatric Gastroenterology | 997J | 2888 | UNM Employer | FY8135 | 00 | CR HSC | 9972H2 | 11.85 | 242,000.00 | 25,122 | | | | | | | | |
| Pediatric General Division | 997K | 2888 | UNM Employer | FY8465 | 00 | CU HSC | 997264 | 1.86 | 107,700.00 | 2,009 | | | | | | | | |
| Pediatric General Division | 997K | 2888 | UNM Employer | FY2287 | 00 | CU HSC | 997558 | 58.00 | 80,000.00 | 48,400 | | | | | | | | |
| Pediatric General Division | 997K | 2828 | UNM Employer | S18552 | 00 | CU HSC | 997745 | 58.00 | 23,004.00 | 11,502 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2888 | UNM Employer | FY8651 | 00 | CR HSC | 9972CP | 21.60 | 72,580.00 | 15,668 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2888 | UNM Employer | FY1268 | 00 | CR HSC | 9972CP | 15.80 | 170,000.00 | 23,148 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2888 | UNM Employer | FY1268 | 00 | CR HSC | 9972CQ | 4.00 | 178,000.00 | 7,120 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2828 | UNM Employer | S85224 | 00 | CR HSC | 9972CP | 9.15 | 82,457.25 | 7,549 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2828 | UNM Employer | S85748 | 00 | CR HSC | 9972CP | 15.85 | 54,000.00 | 7,847 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2828 | UNM Employer | S85748 | 00 | CR HSC | 9972CQ | 16.15 | 54,000.00 | 8,745 | | | | | | | | |
| Pediatric Genetics Dysmorphology | 997L | 2828 | UNM Employer | 0C8754 | 00 | CR HSC | 9972CQ | 15.00 | 11,855.40 | 1,665 | | | | | | | | |
| Pediatric Hematology Oncology | 997M | 2888 | UNM Employer | FY8841 | 00 | CU HSC | 99785X | 18.87 | 245,828.00 | 41,325 | | | | | | | | |
| Pediatric Infectious Disease | 997N | 2888 | UNM Employer | FY8587 | 00 | CU HSC | 9971V0 | 23.52 | 146,000.00 | 42,007 | | | | | | | | |
| Pediatric Neonatology Division | 9970 | 2828 | UNM Employer | S88856 | 00 | CU HSC | 997745 | 55.50 | 54,897.52 | 13,240 | | | | | | | | |
| Pediatric Neonatology Division | 9970 | 2887 | UNM Employer | FTW855 | 00 | CU HSC | 997845 | 40.00 | 46,527.52 | 18,774 | | | | | | | | |
| Pediatric Neonatology Division | 9970 | 2868 | UNM Employer | S84788 | 82 | CU HSC | 997558 | 58.00 | 42,724.18 | 24,362 | | | | | | | | |
| Pediatric Nephrology | 997P | 2888 | UNM Employer | FY8542 | 00 | CR HSC | 9972CR | 5.91 | 152,200.00 | 10,210 | | | | | | | | |
| Pediatric Pulmonary | 9970 | 2888 | UNM Employer | FY8229 | 00 | CR HSC | 9972CS | 1.00 | 286,500.00 | 2,864 | | | | | | | | |
| Pediatric Pulmonary | 9970 | 2828 | UNM Employer | S84426 | 00 | CR HSC | 9972CS | 20.00 | 82,820.04 | 16,564 | | | | | | | | |
| Pediatric Pulmonary | 9970 | 2848 | UNM Employer | S84165 | 00 | CR HSC | 9972CS | 20.00 | 54,366.00 | 10,875 | | | | | | | | |
| Pediatric Pulmonary | 9970 | 2868 | UNM Employer | S85185 | 01 | CR HSC | 9972CS | 20.00 | 29,505.54 | 5,937 | | | | | | | | |

**997B Employee Count: 29**

# Shared Salary Timeline



HSC Departments will be provided with a list of Salary Planner Contacts for Each HSC Department

Shared Salary Department will run the Shared Salary Report from My Reports

Shared Department will review template and make necessary changes

Contact Home Org with changes to the template

If Home Org Dept. is in agreement, they will indicate on template and send back to Shared Org. Dept. If Home Org disagrees, the two departments will negotiate and come to an agreement within 2 weeks of receipt of template

If both departments cannot reach an agreement, the Home Org will communicate this back to the shared dept. via a final updated template by the opening date of Salary Planner

Home Org is responsible for entering agreed upon salary information into Salary Planner

Shared Salary Data Entry Deadline

If any shared salaries were not agreed upon during budget deadline, negotiations should continue and be updated in the HR/PR system in the new fiscal year

| Late Jan | Late Jan | Early Feb | Mid Feb | Late Feb | Early Mar | Mid Mar | Mid Mar | Early Jul |

# The Budget Planner System

# Budget Planner System

Salary Planner
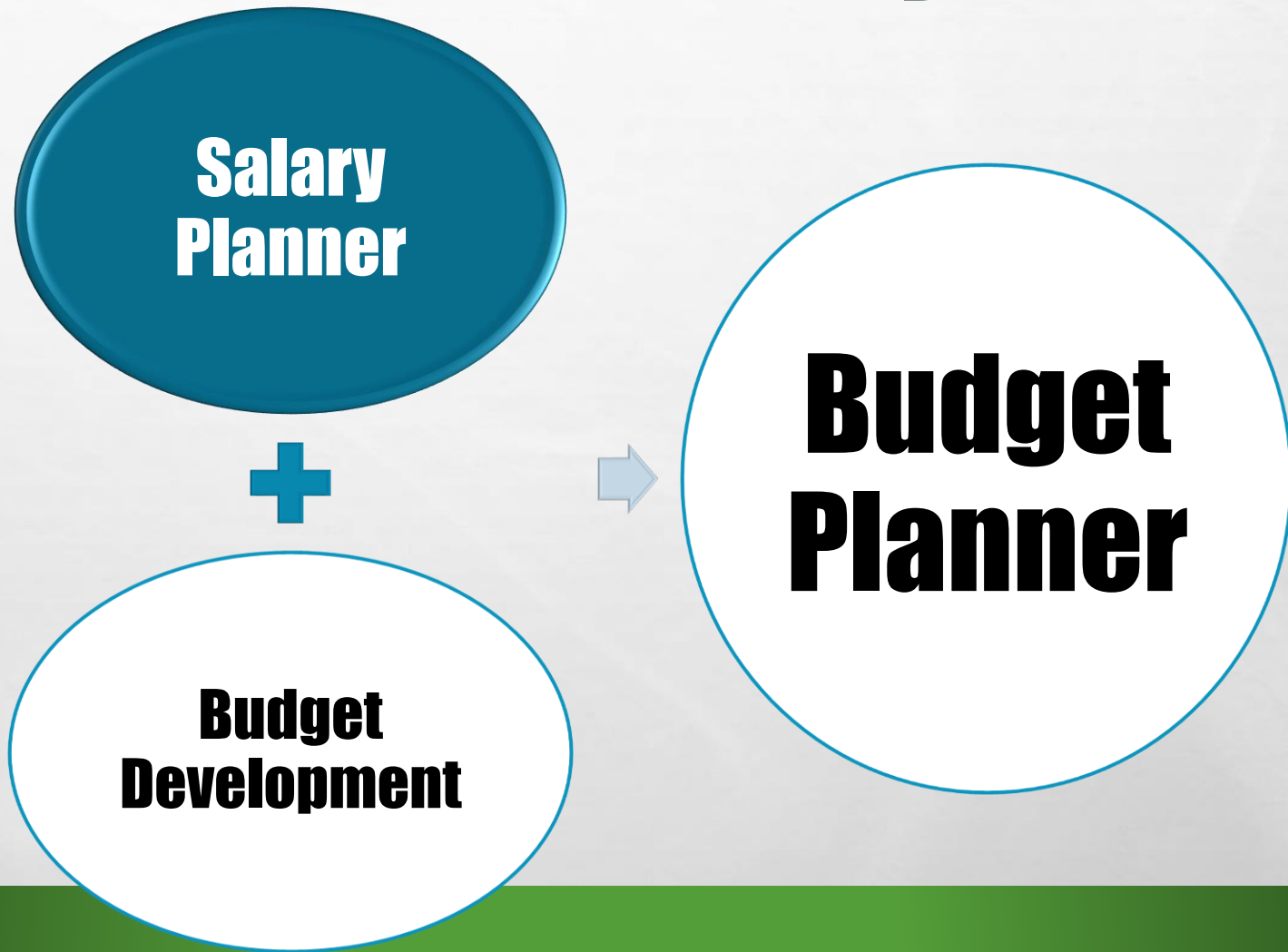
**+**

Budget
Development

**=**

# Budget
# Planner

# Salary Planner

Salary Planner

**+**

Budget Development

➡

Budget Planner

# SALARY PLANNER MENU

Search [        ]  Go

The University of New Mexico
**LoboWeb**

## Budget Planner Menu

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**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**
  View Budget Development 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

# SALARY PLANNER MENU

# EDIT SCENARIO

## Edit Scenario

💬 Choose Extract ID and Scenario, then select filter criteria.

**Scenario Selection**

**Extract ID:** 12FAC21 ▾

**Scenario:** [Y 20 ▾]

12FAC20
12FAC21
9FAC20
9FAC21
CSTAFF20
CSTAFF21
CWA20
CWA21
HSTAFF20
HSTAFF21
POOL20
POOL21
RSTAFF20
RSTAFF21
USUNM20
USUNM21

**Filter Criter**

**By Position** ⦿

**By Employe** ○

[ Select ]

RELEASE: 8.1

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THERE ARE NINE (8) SCENARIOS FOR DEPARMENTS TO SELECT FROM
*Extract ID and Scenario must be selected in combination as listed below*
Extract ID:      Scenario:
12FAC20      12_MO_FACULTY_21
9FAC20      9_MO_FACULTY_21
HSTAFF20      HOUSESTAFF_21
RSTAFF20      REG STAFF_21
POOL20      POOLED_POSITIONS_21
CSTAFF20      CONTRACT_STAFF_21

UNION SCENARIOS
CWA20      CWA_BARG_UNIT_21
USUNM20      USUNM_BARG_UNIT_21

THERE ARE TWO FILTER CRITERIA:
BY POSITION ATTRIBUTES (WILL SELECT ALL POSITIONS) – DEFAULT OPTION
BY EMPLOYEE NAME (WILL SELECT ONE EMPLOYEE AT A TIME)

CLICK ON SELECT BUTTON AT BOTTOM OF SCREEN

**Only use scenarios ending in '21' for this budget cycle.**

# SALARY PLANNER
## JOB VS. POSITION

**HR**

**Budget**

**Job**

How employee is
paid on July 1

Created when Employee is hired
– Always tied to an Employee

**Position**

Creates the Budget

Acts as a place holder and
can be an open position.

Note: If the employee is on any Restricted awards, then you <u>must</u>
<u>budget on both sides</u> in order to get to 100% distribution
*Does not affect or change Grant budget *

# POSITION & JOB SIDES SHOULD = 100% DISTRIBUTIONS SHOULD MATCH

# Salary Planner

# Example Scenarios

# DISTRIBUTION NOT EQUAL TO 100%

| Position and Title | Base Appointment Percent | Proposed Appointment Percent | Base FTE | Proposed FTE | Base Budget | Change Percent | Change Amount | Proposed Budget | Bargaining Unit | Estimated Fiscal Year Budget | Links | Extract Status | Exclude from Totals |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| FY0056 Clinician Ed - Professor | 100.00 | 100.00 | 0 | 0 | .00 | .00 | .00 | .00 | | .00 | Distribution Comments Employee | | ☐ |

**⊘ Saved Proposed Position Labor Distribution Percent does not total 100**

Budget Distribution for Position **FY0056 Clinician Ed - Professor.**

### Current

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| U | 9970US | 3R72KC | 997B00 | 2000 | P17R | GNACTV | | | | 1.00 | .00 |
| U | 9970O3 | 3U0034 | 997I0 | 2000 | P222 | 997I01 | | | | 99.00 | .00 |
| | | | | | | | | | Total | 100.00 | .00 |

### Proposed

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount | Del |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U | 9970O3 ▼ | 3U0034 | 997I0 | 2000 ▼ | P222 | 997I01 | | | | 99.00 | .00 | X |
| | | | | | | | | | Total | 99.00 | .00 | |

[Add New Record]

⚠ **This Position has no incumbents**

[Save] [Copy Position Distribution to Job] [Update Budget]

**Index with term date prior to July 1 has dropped from propose distribution. Update valid index to 100% and Save.**

### Proposed

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount | Del |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| U | 9970O3 ▼ | 3U0034 | 997I0 | 2000 ▼ | P222 | 997I01 | | | | 100.00 | .00 | X |
| | | | | | | | | | Total | 100.00 | .00 | |

[Add New Record]

⚠ **This Position has no incumbents**

[Save] [Copy Position Distribution to Job] [Update Budget]

# COPY POSITION TO JOB – NO INCENTIVE



## Position Labor Distribution

💬 Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

**Budget Distribution for Position FY0246 Associate Professor.**
**Current**

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount |
|-----|-------|------|--------------|---------|---------|----------|----------|--------------|-----------|---------|--------|
| U | 624000 | 3U0044 | 624C0 | 2000 | P101 | GNACTV | | | | 95.00 | 85,130.45 |
| U | 624309 | 3L500 | 624C18 | 2000 | P16R | GNACTV | | | | 5.00 | 4,480.55 |
| | | | | | | | | | Total | 100.00 | 89,611.00 |

**Proposed**

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount | Del |
|-----|-------|------|--------------|---------|---------|----------|----------|--------------|-----------|---------|--------|-----|
| U | 624000 ▼ | 3U0044 | 624C0 | 2000 ▼ | P101 | GNACTV | | | | 95.00 | 85,130.00 | X |
| U | 624309 ▼ | 3L500 | 624C18 | 2000 ▼ | P16R | GNACTV | | | | 5.00 | 4,481.00 | X |
| | | | | | | | | | Total | 100.00 | 89,611.00 | |

[ Add New Record ]

**Current Incumbent**
**Name and ID:** Laura
**Position-Suffix and Title:** FY0246-00 Associate Professor

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount |
|-----|-------|------|--------------|---------|---------|----------|----------|--------------|-----------|---------|--------|
| U | 624000 | 3U0044 | 624C0 | | | | | | | 90.00 | 80,649.90 |
| U | 624309 | 3L500 | 624C18 | 2000 | P16R | GNACTV | | | | 5.00 | 4,480.55 |
| U | 624329 | 3V760 | 624C08 | 2000 | P16R | GNACTV | | | | 5.00 | 4,480.55 |
| | | | | | | | | | Total | 100.00 | 89,611.00 |

[ Save ] [ Copy Position Distribution to Job ] [ Update Budget ]

**Job needs to be updated to match position!**

- **UPDATE THE POSITION DISTRIBUTION, AS APPROPRIATE, BY MAKING CHANGES TO THE INDEX, ACCOUNT, PERCENT OR AMOUNT.**

- **CLICK "COPY POSITION DISTRIBUTION TO JOB" TO PULL THE INFORMATION INTO THE JOB LABOR DISTRIBUTION.**

# COPY POSITION TO JOB – ADD INCENTIVE

Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

**Budget Distribution for Position FY0007 Clinician Ed - Professor.**

**Current**

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount |
|-----|-------|------|--------------|---------|---------|----------|----------|--------------|-----------|---------|--------|
| U | 160026 | 3U0032 | 160B00 | 2000 | P222 | GNACTV | | | | 2.10 | 4,164.91 |
| U | 311007 | 3U0034 | 311A | 2005 | P222 | 311A05 | | | | 10.39 | 20,606.38 |
| U | 160341 | 3U0034 | 160B00 | 2000 | P222 | 160B00 | | | | 24.78 | 49,145.93 |
| U | 311007 | 3U0034 | 311A | 2000 | P222 | 311A05 | | | | 62.73 | 124,411.78 |
| | | | | | | | | | Total | 100.00 | 198,329.00 |

*Position Side Includes Incentive*

**Proposed**

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount | Del |
|-----|-------|------|--------------|---------|---------|----------|----------|--------------|-----------|---------|--------|-----|
| U | 160026 | 3U0032 | 160B00 | 2000 | P222 | GNACTV | | | | 2.10 | 4,165.00 | X |
| U | 311007 | 3U0034 | 311A | 2005 | P222 | 311A05 | | | | 10.39 | 20,606.00 | X |
| U | 160341 | 3U0034 | 160B00 | 2000 | P222 | 160B00 | | | | 24.78 | 49,146.00 | X |
| U | 311007 | 3U0034 | 311A | 2000 | P222 | 311A05 | | | | 62.73 | 124,412.00 | X |
| | | | | | | | | | Total | 100.00 | 198,329.00 | |

[ Add New Record ]

*Job Side Does Not Include Incentive*

**Current Incumbent**

Name and ID:  Charles 

Position-Suffix and Title: FY0007-00 Clinician Ed - Professor

| COA | Index | Fund | Organization | Account | Program | Activity | Location | Project Type | Cost Type | Percent | Amount |
|-----|-------|------|--------------|---------|---------|----------|----------|--------------|-----------|---------|--------|
| U | 160341 | 3U0034 | 160B00 | 2000 | P222 | 160B00 | | | | 27.65 | 49,139.23 |
| U | 311007 | 3U0034 | 311A | 2000 | P222 | 311A05 | | | | 70.00 | 124,403.10 |
| U | 160026 | 3U0032 | 160B00 | 2000 | P222 | GNACTV | | | | 2.35 | 4,176.39 |
| | | | | | | | | | Total | 100.00 | 177,718.72 |

[ Save ]  [ Copy Position Distribution to Job ]  [ Update Budget ]

HINT:  FIRST COPY POSTION TO JOB WITHOUT THE INCENTIVE.  THEN, GO BACK TO POSITION AND ADD THE INCENTIVE AND SAVE  – **DO NOT COPY TO JOB AGAIN**

# ZERO OUT A POSITION BUDGET
## (EX: YOU ARE NOT FILLING A POSITION – FREE UP BUDGET)

Back to
**Employee Life Tab**

LoboMail  UNM Learn  Calendar  Groups       Logout

Jump to Bottom

**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 Assoc Professor | 100.00 | 100.00 | 0 | 0 | .00 | .00 | .00 | .00 | | .00 | Distribution Comments Employee | | ☐ |
| FY1015 Research Professor | 100.00 | 100.00 | .85 | .85 | 102,479.00 | 0.00 | 0.00 | 102479.00 | | 117,971.00 | Distribution Comments Employee | | ☐ |
| FY1101 Research Asst Professor | 100.00 | 100.00 | .5 | .5 | 48,900.00 | -100.00 | -48900.00 | 0.00 | | .00 | Distribution Comments | | ☐ |
| FY1607 Research Asst Professor | 100.00 | 100.00 | 0 | 0 | .00 | .00 | .00 | .00 | | | | | ☐ |
| **Total:** | | | 1.35 | 1.35 | 151,379.00 | .00 | .00 | 151,379.00 | | | | | |

**To zero out a proposed budget, enter a minus 100 in the change percent field. After you enter that and tab thru the proposed budget field will reflect zero. Save.**

**Summary**

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

# ZERO OUT A JOB

## (EXAMPLE : EMPLOYEE IS SEPARATING BEFORE JULY 1ST, BUT YOU WANT TO KEEP THE POSITION BUDGETED)

## 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 | | | Yes |

Mass Apply

Jump to Bottom

**013B Continuing Med Educ Gen Admin, Locked, Updateable**

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

Note:  Remember to enter comments to explain why job and position don't match!!

# CHANGE IN APPOINTMENT PERCENTAGE

Back to
Employee Life Tab

LoboMail  UNM Learn  Calendar  Groups  Logout  Help

| 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 | | | | | |
| 100006344 Archuleta, Marvin T. | S02182 - 00 Accountant 2 | 100.00 | 45,426.07 | 100.00 | 100.00 | 44,318.12 | 2.50 | 1,107.95 | 45,426.07 | Changed | |
| 100479171 Beenhouwer, Kyle | S06529 - 01 Student Success Specialist | 100.00 | 38,850.00 | 100.00 | 100.00 | 36,999.96 | 2.50 | 925.00 | 37,924.96 | Changed | |
| 101499905 Hatcher, James C. | S06887 - 00 Sr IT Support Tech | 100.00 | 36,598.65 | 100.00 | 100.00 | 35,706.00 | 2.50 | 892.65 | 36,598.65 | Changed | |
| 100251717 Holub, Justin M. | S09090 - 00 Coord,Education Support | 100.00 | 33,046.00 | 100.00 | 100.00 | 32,240.00 | 2.50 | 806.00 | 33,046.00 | Changed | |
| 100010481 Holub, Paula R. | S03276 - 00 Academic Opns Ofcr | 100.00 | 90,948.42 | 100.00 | 100.00 | 88,730.17 | 2.50 | 2,218.25 | 90,948.42 | Changed | |
| 101663334 Ibrahim, Olla A. | S09177 - 00 Student Success Specialist | 100.00 | 38,665.00 | 100.00 | 100.00 | 36,999.96 | 2.50 | 925.00 | 37,924.96 | Changed | |
| 100013675 Lofton, Ramsey A. | S04376 - 00 Supv,Community Ed Programs | 100.00 | 53,483.13 | 75.00 | 100.00 | 39,134.00 | 35.83 | 14,023.00 | 53,157.00 | Changed | |

## Appointment Percentage Changes
Changes in Appointment Percentage could be processed through Salary Planner and require a Change in Appointment Percentage EPAF and form.
**Example:  Faculty increasing FTE from .75 to 1.0 FTE**

**Note:   Change must also be done on the Position Side!**

# POSITION DETAIL SCREEN

## Position Detail

**Update of Budget Development**

| | |
|---|---|
| **Chart of Account:** | U |
| **Budget ID:** | BUD-21 |
| **Budget Phase:** | ADOPTD |

**Mass Changes**

| | |
|---|---|
| **Percent:** | |
| **Amount:** | |

**\*** - indicates a required field.

**Budget Detail for Position FY1620 Clinician Ed - Professor**

| Model: | Proposed | Base | Current |
|---|---|---|---|
| Fiscal Year Budget: | 181,800.00 | 181,800.00 | 181,800.00 |
| FTE:* | 1 | 1 | 1 |
| Appointment Percent: | 100.00 | 100.00 | 100.00 |
| Total Salaries: | 181,800.00 | 181,800.00 | |
| Estimated Fiscal Year Budget: | 181,800.00 | | |
| Exclude from Totals: | No | | |

**Position**

| | |
|---|---|
| **Organization:** | 160B - Family Community Medicine FCM |
| **Type:** | Single |
| **Begin Date:** | Jan 01, 2011 |
| **End Date:** | |
| **Status:** | Active |

Previous    Next

## IMPORTANT!

**Please review _ALL_ FTE data to ensure accurate and appropriate FTEs for positions. Please clean up and/or correct FTE that is incorrect. Not doing so reports inaccurate FTE data for the School.**

# POSITION DETAIL SCREEN (CONT.)

Example :  Incorrect FTE and Salary listed for position.

### Budget Detail for Position UB0139 #Student Entry Level

| Model: | Proposed | Base | Current |
|---|---|---|---|
| **Fiscal Year Budget:** | 50,000.00 | .00 | .00 |
| **FTE:** ✱ | 1 | 0 | 0 |
| **Appointment Percent:** | 100.00 | 100.00 | 100.00 |
| **Total Salaries:** | | | |
| **Estimated Fiscal Year Budget:** | .00 | | |
| **Exclude from Totals:** | ☐ | | |

### Position
**Organization:**
**Type:**        Pooled
**Begin Date:**  Jul 01, 2007
**End Date:**
**Status:**      Active

# CHANGE IN SALARY EXAMPLE: CAREER LADDER

## 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 | | | Yes |

Mass Apply

Jump to Bottom

**013B Continuing Med Educ Gen Admin, Locked, Updateable**

| ID and Name | Position, Suffix and Title | Employee Totals Appointment Percent | Salary | Department Totals Base Appointment Percent | Proposed Appointment Percent | Base Salary | Change Percent | Change Amount | Proposed Job Salary | Extract Status | Excluded from Totals |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 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 | | |

During the Salary Planner refresh period, if you process an action impacting the employee's salary, then you must update the changes in Salary Planner as well.

# SALARY PLANNER REPORTS

The University of New Mexico

## LoboWeb

## 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.

**After doing your updates in SP, compare these two reports.**
Job distribution, <u>by index</u>, should be in sync with position distribution .
If reason is other than incentive amount (2005, 200G or 200H), <u>please **correct,** or **explain the reason in the comments**</u>.

**UNM**

| Account | Employee Name | Position, Suffix, Title | Hiring Org | Performance Rating | Posn Budget | Current Labor Distribution | | | | Proposed Labor Distribution | | | | Change Amt | Change % |
|---------|---------------|------------------------|-----------|-------------------|-------------|--------|------|--------|-----|--------|------|--------|-----|-----------|----------|
| | | | | | | Index | % | Amount | FTE | Index | % | Amount | FTE | | |
| 2020 | * Vacant Position | S06607 Executive Project Director | 099D | | 0 | 043482 | 100.00% 100.00% | 0 $0 | | 043482 | 100.00% 100.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S06709 HS Associate Scientist 3 | 099Q | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S06716 Fiscal Services Tech | 523K | | 0 | R 043499 | 100.00% 100.00% | 1 $1 | | R 043499 | 100.00% 100.00% | 1 $1 | | 0 | 0.00% |
| | * Vacant Position | S06767 Health Educator | 160I | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S06853 HS/Associate Scientist 2 | 099Q | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07318 Dental Assistant | 523K | | | R 043499 | 100.00% 100.00% | 1 $1 | | | 0.00% 0.00% | 0 $0 | | (1) | (100.00%) |
| | * Vacant Position | S07332 Health Educator | 160I | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | Vacant Position | S07380 Mgr, Som Faculty Emplymt Svcs | 043G | | 0 | 268000 | 100.00% 100.00% | 0 $0 | 1.00 | 268000 | 100.00% 100.00% | 0 $0 | 1.00 | 0 | 0.00% |
| | * Vacant Position | S07412 Clinical Research Mgr | 558B | | | R 043499 | 0.00% 0.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07424 HS Research Tech 2 | 099Q | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07599 Training & Devt Consultant | 558E | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07627 Dental Assistant | 523K | | | R 043499 | 100.00% 100.00% | 1 $1 | | | 0.00% 0.00% | 0 $0 | | (1) | (100.00%) |
| | * Vacant Position | S07645 Dental Assistant | 523K | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07646 Admin Assistant 2 | 523K | | 0 | R 043499 | 100.00% 100.00% | 1 $1 | | R 043499 | 100.00% 100.00% | 1 $1 | | 0 | 0.00% |
| | * Vacant Position | S07651 Database Administrator | 851E | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07696 Dental Assistant | 523K | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07705 Dental Assistant | 523K | | | R 043499 | 100.00% 100.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07925 Clinical Research Mgr | 558B | | | R 043499 | 0.00% 0.00% | 0 $0 | | | 0.00% 0.00% | 0 $0 | | 0 | 0.00% |
| | * Vacant Position | S07944 Analyst/Programmer 2 | 099M | | | R 043499 | 100.00% | 0 | | | 0.00% | 0 | | | |

**Review reports closely to look for FTE issues like these vacant positions with 1 FTE or dollars budgeted. These need to be fixed!**

# Budget Planner

Salary Planner

**+**

Budget Development

→
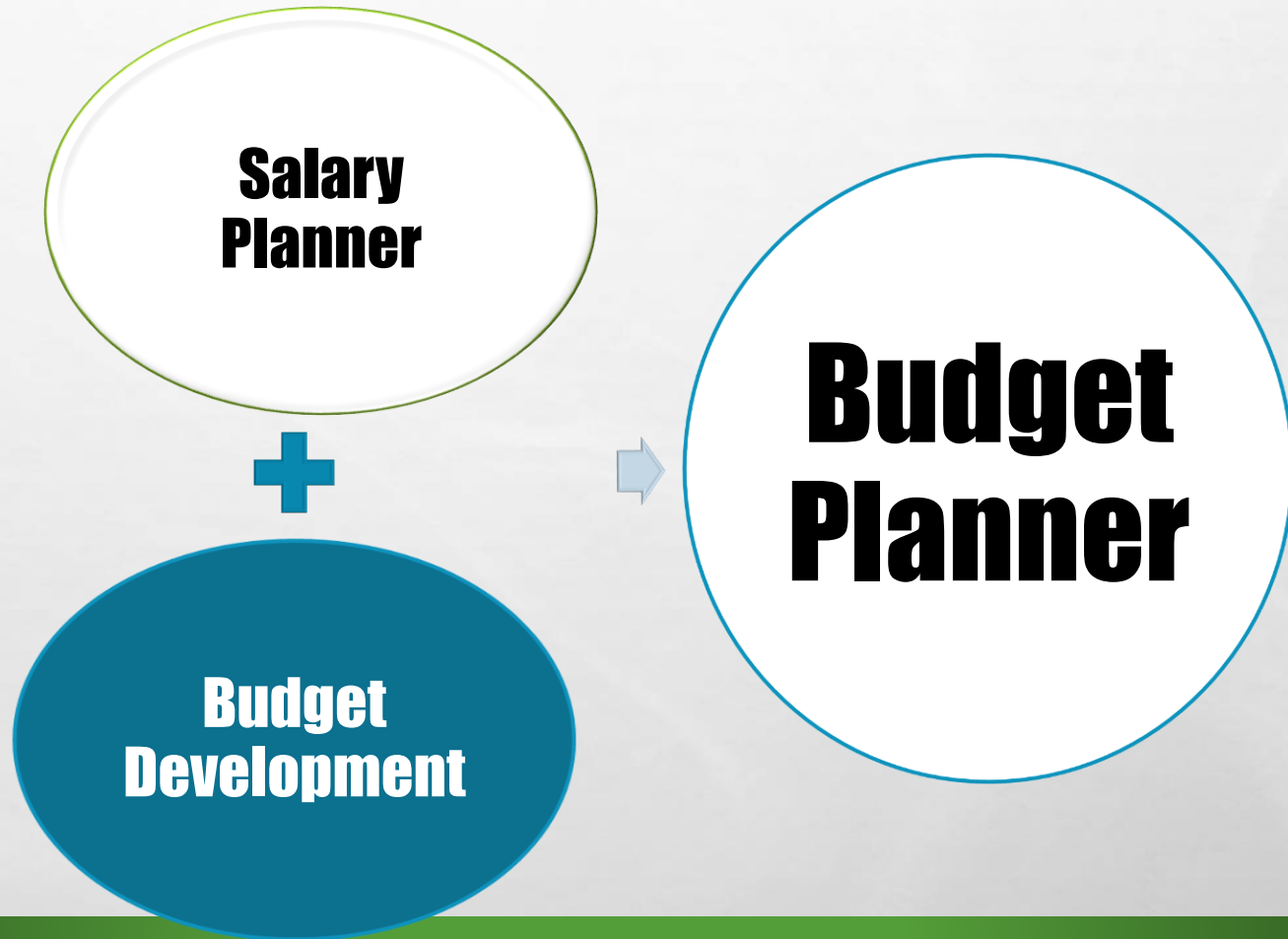
**Budget Planner**

# Budget Development

## Business Rules and General Guidelines

# BUDGET PLANNER

## BUDGET DEVELOPMENT

ENTER INFORMATION USING:

**ALL INDICES WITH CURRENT UNRESTRICTED FUNDS MUST BE BUDGETED!**

**BUDGET ID:  BUD21**

**BUDGET PHASE:  ADOPTD**

No budget equals no spending!

# Budget Development Business Rules

- **INDEX BUDGETS MUST NET TO ZERO**: BUDGETED REVENUES MINUS BUDGETED EXPENSES MUST EQUAL ZERO

- **BUDGET ALL SOURCES OF REVENUE AND CORRESPONDING EXPENDITURES**

- THE FOLLOWING INFORMATION WILL BE PROVIDED TO YOUR DEPARTMENT BY THE SOM FINANCE OFFICE AS SOON AS IT IS AVAILABLE.

  NOTE:  <u>REVENUE MUST MATCH AMOUNTS IN SOM DEPARTMENT FOLDER</u>
  - SOM CHECKLIST (TO BE REVIEWED BY SOM FINANCE OFFICE)
  - UNMMG REVENUE
  - DEAN'S ALLOCATIONS / I&G ALLOCATIONS
  - APPROVED MARGIN
  - F&A DISTRIBUTION
  - ENDOWED FUNDING DISTRIBUTION GUIDELINES
  - SALARY AGREEMENTS <u>AND</u> MID-LEVEL PASS THROUGHS WITH HOSPITAL (NOT IN FOLDER, BUT MUST BE BUILT INTO REVENUE)

# SOM CHECKLIST

| | | | |
|---|---|---|---|
| 1 | **Closeout Checklist** | | |
| 2 | **Department Name:** | | |
| 3 | **Reviewer:** | | |
| 4 | **Date:** | | |
| 5 | **Salary Planner** | | |
| 6 | Generate and Save: | | |
| 7 | | | |
| 8 | Baseline | Final | |
| 9 | | | Salary Planner Working Report | Labor Distribution and Position Distribution should be 100% |
| 10 | | | Salary Planner Exception Report | |
| 11 | | | Vacant Position Report | |
| 12 | | | Salary Planner Position Report | |
| 13 | | | |
| 14 | **In MyReports** | | |
| 15 | Generate and Save: | | |
| 16 | | | |
| 17 | | Unrestricted Balances by Index through prior month and prior year | Use in analysis of 1901 |
| 18 | | Operating Ledger Summary prior month and prior Year end 6/30/XX | Use in analysis of FB, 1901 and Misc revenues |
| 19 | | | |
| 20 | **EPRINT** | | |
| 21 | Generate and Save: | | |
| 22 | | Index Hierarchy Report | Use to determine current unrestricted indices under your org |
| 23 | **Budget Planner** | | |
| 24 | Generate and Save: | | |
| 25 | | | |
| 26 | Baseline | Final | |
| 27 | | | Budgeted Account Code Totals Report | Should net to target margin |
| 28 | | | Index out of Balance | Any indices out of balance should be balanced |
| 29 | | | Operating Budget Summary | Should net to target margin |
| 30 | | | Budget Development Working Report-w/ Postion Detail | |
| 31 | | | Budgeted Transfer/Allocations Report | |

## Run Baseline Reports Before You Begin

# SOM CHECKLIST

| | Acct | Description | Target |
|---|---|---|---|
| 38 | | | |
| 39 | 0720 | State Appropriation | Should tie to State Appropriations Letter |
| 40 | 0740 | State Appropriation | Should tie to State Appropriations Letter |
| 41 | 0750 | State Appropriation | Should tie to State Appropriations Letter |
| 42 | 1100 | State Appropriation F&A Administrative Overhead Charge | Should tie F&A State Appropriations Letter |
| 43 | 1640 | I&G | Should tie to Dean's I&G Allocation sheet |
| 44 | 1601 | F&A | Should tie to SOM F&A Summary |
| 45 | 1610 | Dean's Allocations | Should tie to Dept Rept of Allocations |
| 46 | 1600/1620/1660 | Internal allocation run by level 5 Org and by fund | Should net to zero by fund and in total unless external alloc's |
| 47 | 0340 | UH allocation | Should tie to Dean's Allocation (plus Sal Agrmts/Other MOU's) |
| 48 | 0341 | UH allocation run by level 5 Org and by fund | Should net to zero and only be in Fund 3U0034 Indices |
| 49 | 0380 | UNMMG Purchased Service less Special Arrangement (SA) | Must tie to UNMMG template less Special Arrangements |
| 50 | 0381 | Allocation of UNMMG non SA | Should net to zero and only between Funds 3U0032 and 3U0033 |
| 51 | 0390 | UNMMG Purchased Service SA | Must tie to UNMMG template for Special Arrangements |
| 52 | 0391 | Allocation of UNMMG SA | Should net zero and only between Funds 3U0033 and 3U0032 |
| 53 | 07D0 | Santa Fe Tax for clinical Depts | Should tie to SoM Dean's Santa Fe Tax Summary |
| 54 | 0351 0381 | Cancer Center Shared Distributions (USE ACCT 0381) | Should tie to CC Distribution Schedule |
| 55 | 0360 | SRMC Revenue | Should equal sum of projected dept-incurred SRMC expenses |
| 56 | | | of only "pre-approved" SRMC positions, with raises on these |
| 57 | | | positions built into the amount. Check validity of dept's |
| 58 | | | budgeted amount by comparing 0360 amounts year over year. |
| 59 | 0361 | Allocation of SRMC Revenue | Should net to zero between Funds 3U0070 and 3U0087 |
| 60 | 1000 | Gifts | Compare to YTD and Prior Year to determine if reasonable |
| 61 | 1011 | Endowed Spending | Should tie to spreadsheet provided by Dean's Office |
| 62 | 11xx/12xx | Transfer to From | need to be run and determine if correct |
| 63 | 12P0 | Transfer from Endowment | Should tie to spreadsheet provided by Dean's Office |
| 64 | 12P1 | DO NOT USE THIS ACCT CODE Non unitized transfer | Change to 12P0-Do not use 12P1 |
| 65 | 07Z0 | Other Sales and Services | Compare to YTD and Prior Year to determine if reasonable |
| 66 | 0810 | Gain on Sponsored Project | Compare to YTD and Prior Year to determine if reasonable |
| 67 | 0811 | Gain on Unrestricted Project | Compare to YTD and Prior Year to determine if reasonable |
| 68 | 1901 | Use of Balance | Should not exceed projected year-end balance in index - Total |
| 69 | | | net to Approved Use of CF (Target Net Margin) given by SOM |
| 70 | 2110-21J0 | Fringe total | Compare to YTD and Prior Year to determine if reasonable |

Sheet1  Sheet2  Sheet3

# Cross Check List Before Submitting Your Budget

# Budget Development Business Rules

## ALLOCATIONS AND TRANSFERS

- **Budget both sides (TO and FROM)**
  use MyReports FORITAH - HSC Transfer Allocation Report if you need help
  determining if you should be budgeting a Transfer or Allocation.

- **Allocations (16xx) must zero out by fund unless its an external allocation.**

- If monies are going to another department, make sure the other department
  budgets their part for the exact amount.
  **Departments must work collaboratively on this effort.**

- **ENTER COMMENTS IN ACCOUNT CODE TEXT BOX**
  Explain where allocation/transfer is going to
  or coming from.
  **INCLUDE INDEX, ACCOUNT CODE AND AMOUNT**

**Return Schedule of Transfers and Allocations to Theresa Kelley by or before
your scheduled lock date.**

# Budget Development Business Rules

## 20SA - Salary Adjustments

- Used to budget a position that does not exist in the system.
- Used for Salaries **ONLY**!
- **No Faculty Incentives** (use 20FI – see below)
- No negative adjustments and no adjustments to existing salaries.
- **Must enter comments.** Include Position and Amount for each item included
- Must be reallocated in July to correct Salary Account codes immediately after FY20 budgets are posted in Banner.
- Impacts reporting.

## 20FI - Faculty Incentive Adjustments

- Use to budget faculty incentive amounts not budgeted in Salary Planner using 2005 (due to unidentified people / amounts / timing)
- Must be reallocated to 2005 in July.
- Impacts reporting

## 20H0 - Health System Compensation

- Used for Salary Agreements with the Medical Group and UH

# Budget Development Business Rules

- **SOM Departments should build to their Target Margins approved by the Dean's office.**

    **1901 (Budgeted Use of Reserves)**
    **Note:  only to be used between indices**
    **and/or for approved amounts only – see slide 61)**

- **8060 (Other Operating Costs)**
    **Use of this account code is strongly discouraged.**
    If use of 8060 is required, use it sparingly and include detail in notes.

# THINGS TO REMEMBER

- There should **not** be two people in the same position (two jobs tied to one position). Contact your Employment Area, for assistance to correct.

- FTE Changes - Decreases/increases in FTE require signed "Change in FTE" form. This change impacts benefits.

- If a position labor distribution includes Restricted Indices, that portion of the distribution will not feed to Budget Finance; however, it still needs to be included for the distribution to equal 100%. This will not override your existing grant budget.

- If Restricted Index is ending, be sure to have your shell index or another index to budget against.

- Deadline to set-up Unrestricted and/or Restricted shell accounts for Budget Development is March 30,2020.

# MORE THINGS TO REMEMBER

- When building your budget, start by entering the information received by the SOM Finance Office (you will be contacted when this information is available for your department or it will be emailed to you).

- Discuss unique circumstances with Kristin Gates (SOM departments) or HSC Budget Office (all other departments and colleges).

- Utilize the open lab sessions for one-on-one assistance from SOM, HSC Budget Office and HR reps.

- Send an email to Yvette Hall yhall@salud.unm.edu when the Level 5 Dept budget is complete and ready to be locked (if earlier than 5pm on your scheduled lock date).

# POSITION MANAGEMENT

- Staff Positions
    - HR Transaction Center          277-4777


- Faculty Positions
    - Office of Faculty Affairs & Services

    (Main and Branch Campuses)     277-4528
    - HSC Faculty Contracts           272-4231


- Student Positions
    - Student Employment             277-3511

# RESOURCES

**UNM Budget Office**
  Website: http://budgetoffice.unm.edu/budget/index.html
                                        FY20/21 Budget Development Calendar
                                        FY21 Budget Guidelines
                                        Standard Operating Procedures (SOPs)

**Learning Central**
  Website:  learningcentral.health.unm.edu/plateau/user/login.jsp
                                        Budget Planner Online Course
                                        Budget Planner Proficiency Exam

**Human Resources Division**
  Support Center     277-4777                  Help with navigational issues in Salary Planner
                                          Referral to the correct Subject Matter Expert for
                                          your question

**Contact your HR Consultant**         To locate the name of your HR Consultant, visit the
following website:  **https://lobowebapp.unm.edu/apex_ods/f?p=145:1**

# QUESTIONS?

*COMING UP NEXT:*
BUDGET PLANNER OVERVIEW
FOR NEW USERS

# Budget Planner

New User
System Overview

# BUDGET PLANNER SYSTEM ACCESS

Accessed through LoboWeb

New users must take the Budget Planner Online Course and pass the Budget Planner Proficiency Exam on Learning Central in order to get access to the system

BAR access roles:
- **Department General Inquiry**
- **Department Budget Developer**
- **Department Salary Planner**
- Request only highest level organization code – workflow recognizes org hierarchies

**Changed departments since last budget process**?
Be sure to update your BAR Organization security

# BUDGET DEVELOPMENT



- GO TO THE "FINANCE" TAB IN LOBOWEB AND CLICK ON BUDGET PLANNER MENU.

# BUDGET DEVELOPMENT
# CREATE BUDGET WORKSHEET



- FROM THE BUDGET PLANNER MENU CLICK ON "CREATE BUDGET WORKSHEET".

# BUDGET DEVELOPMENT CREATE QUERY



- CLICK ON "CREATE QUERY".

# BUDGET DEVELOPMENT



- YOU DO NOT NEED TO SELECT ANY OF THE COLUMNS TO DISPLAY (UNLESS YOU WOULD LIKE TO ADD A DIFFERENT COLUMN VIEW).
- CLICK "CONTINUE".

# BUDGET DEVELOPMENT

## Create Budget Worksheet

Chart, Budget ID, Phase, Fund, and Organization are required. Program and Account m
Budget Duration (or All), source for Financial Manager (or None), and account types to

| Chart of Accounts | U |
|---|---|
| **Budget ID** | BUD21 |
| Account Index | 702000 |
| **Fund** | 3U0044 |
| **Organization** | 702A |

| **Budget Phase** | ADOPTD | Budget |
|---|---|---|
| **Program** | P131 | |
| **Activity** | GNACTV | |
| **Location** | | |

**Display Fin Mgr from:** None ▼

**Check to Include:**
- ☑ Revenue Accounts
- ☑ Labor Accounts
- ☑ Expenses
- ☑ Deleted Items

Account Index Lookup feature in Budget Development also returns a list of unrestricted indices based on lookup parameters

**Save Query as:** [          ]
☐ **Shared**

Submit

- **ENTER "U" FOR THE CHART OF ACCOUNTS, BUDGET ID, BUDGET PHASE, AND ACCOUNT INDEX.**
- **SELECT TO INCLUDE REVENUE ACCOUNTS, LABOR ACCOUNTS, EXPENSES, AND DELETED ITEMS.**
- **CLICK "SUBMIT" TWICE.**

# ADD ACCOUNT CODES OR COMMENTS



- Add a new account code and value by entering the information under "New Row".
- Click on the account code to leave a comment, if pertinent.
- If using 20SA or 20FI – there must be a comment with details including position, FTE, amount and the initials of the person entering the comment.

Only enter a positive amount in this account code.

# UPDATED NEW ACCOUNT CODE AND DELETE RECORD OPTION

**Change Value:** [                    ] ☐ **Percent**  [ Calculate ]

*Worksheet*

| Status | Text | Index Code | Program | Account Type/Code | Title | Base Budget | Budget Duration Code | Proposed Budget | Change Value | Percent | Cumulative Change | New Budget | Delete Record |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 043000 | P101 | | Instruction Unrestricted | | | | | | | | |
| | | | | 5T | Intra University Activities | | | | | | | | |
| OPAL | N | | | 1610 | Allocations SOM Gen | ( 1,548,644.00) | P | ( 1,548,644.00) | | ☐ | 0.00 | ( 1,548,644.00) | ☐ |
| OPAL | N | | | 1640 | Allocations Pooled Allocation Gen | 1,616,275.00 | P | 1,616,275.00 | | ☐ | 0.00 | 1,616,275.00 | ☐ |
| OPAL | N | | | 1660 | Allocations Other Gen | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| OPAL | N | | | 1901 | Budgeted Use of Reserves | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| | | | | 63 | Operating Expense Labor Contingency | | | | | | | | |
| OPAL | N | | | 20SA | Salary Adjustments | 67,631.00 | P | 67,631.00 | | ☐ | 0.00 | 67,631.00 | ☐ |
| | | | | 71 | Operating Expense Other | | | | | | | | |
| OPAL | N | | | | Office Supplies General | 0.00 | P | 0.00 | | ☐ | 0.00 | | ☐ |
| NEW | N | | | 69Y0 | Professional Svcs F&A Unallowable | 0.00 | P | 1,000.00 | | ☐ | 1,000.00 | 1,000.00 | ☐ |
| OPAL | N | | | 80K0 | Banner Tax | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |

- ACCOUNT 69Y0 HAS BEEN ADDED IN THE AMOUNT OF $1,000
- CAN ALSO DELETE ACCOUNT CODE RECORD – SEE COLUMN TO FAR RIGHT

- ONCE YOU HAVE MADE THE APPROPRIATE CHANGE(S) AND POSTED THEM, YOU CAN VIEW THE SUMMARY TO SEE IF THE INDEX BALANCES.

# BUDGETING USE OF RESERVES - 1901

## SOM Departments should always build to their Target Margins approved by the Dean's Office.

| Account Type/Code | Title | Adopted Budget | Permanent Adjustments | Temporary Adopted | Temporary Adjustments | Base Budget | Budget Duration Code | Proposed Budget | Change Value | Percent | Cumulative Change | New Budget | Delete Record |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Non Sponsored Public Service | | | | | | | | | | | | |
| 51 | Operating Revenues | | | | | | | | | | | | |
| 0380 | UNMMG Clinical Sales & Services | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| 5T | Intra University Activities | | | | | | | | | | | | |
| 1901 | Budgeted Use of Reserves | 8,080.00 | 0.00 | 0.00 | 0.00 | 8,080.00 | P | 10,000.00 | | ☐ | 1,920.00 | 10,000.00 | ☐ |
| 71 | Operating Expense Other | | | | | | | | | | | | |
| 50E0 | Lab Medical Supplies Gen | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| 69Z0 | Other Professional Services Gen | 8,000.00 | 0.00 | 0.00 | 0.00 | 8,000.00 | P | 10,000.00 | | ☐ | 2,000.00 | 10,000.00 | ☐ |
| 8045 | Interdepartmental Support | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| 80K0 | Banner Tax | 80.00 | 0.00 | 0.00 | 0.00 | 80.00 | P | 0.00 | | ☐ | ( 80.00) | 0.00 | ☐ |

## Index Must net to $0

# BUDGETING SURPLUS IN AN INDEX
## INCORRECT WAY TO BUDGET

| Program | Account Type/Code | Title | Adopted Budget | Permanent Adjustments | Temporary Adopted | Temporary Adjustments | Base Budget | Budget Duration Code | Proposed Budget | Change Value | Percent | Cumulative Change | New Budget | Delete Record |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| P171 | | Non Sponsored Public Service | | | | | | | | | | | | |
| | 51 | Operating Revenues | | | | | | | | | | | | |
| | 0380 | UMMG Clinical Sales & Services | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 20,000.00 | | ☐ | 20,000.00 | 20,000.00 | ☐ |
| | 5T | Intra University Activities | | | | | | | | | | | | |
| | 1901 | Budgeted Use of Reserves | 8,080.00 | 0.00 | 0.00 | 0.00 | 8,080.00 | P | 0.00 | | ☐ | ( 8,080.00) | 0.00 | ☐ |
| | 71 | Operating Expense Other | | | | | | | | | | | | |
| | 50E0 | Lab Medical Supplies Gen | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| | 69Z0 | Other Professional Services Gen | 8,000.00 | 0.00 | 0.00 | 0.00 | 8,000.00 | P | 10,000.00 | | ☐ | 2,000.00 | 10,000.00 | ☐ |
| | 8045 | Interdepartmental Support | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| | 80K0 | Banner Tax | 80.00 | 0.00 | 0.00 | 0.00 | 80.00 | P | 0.00 | | ☐ | ( 80.00) | 0.00 | ☐ |

**Summary Totals**

| Account Type | Account Type Title | Base Budget | Proposed Budget | New Budget | Cumulative Change |
|---|---|---|---|---|---|
| 51 | Operating Revenues | 0.00 | 20,000.00 | 20,000.00 | 20,000.00 |
| 5T | Intra University Activities | 8,080.00 | 0.00 | 0.00 | ( 8,080.00) |
| 50 | Revenues and Intra Univ Activities | 8,080.00 | 20,000.00 | 20,000.00 | 11,920.00 |
| | | | | | |
| 71 | Operating Expense Other | 8,080.00 | 10,000.00 | 10,000.00 | 1,920.00 |
| 70 | Other Expense | 8,080.00 | 10,000.00 | 10,000.00 | 1,920.00 |
| | | | | | |
| | Net | 0.00 | 10,000.00 | 10,000.00 | 10,000.00 |

**This example creates an Index Out of Balance**

# BUDGETING SURPLUS IN AN INDEX (CONT.)
## √ CORRECT WAY TO BUDGET

| ram | Account Type/Code | Title | Adopted Budget | Permanent Adjustments | Temporary Adopted | Temporary Adjustments | Base Budget | Budget Duration Code | Proposed Budget | Change Value | Percent | Cumulative Change | New Budget | Dele Reco |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Non Sponsored Public Service | | | | | | | | | | | | |
| 51 | | Operating Revenues | | | | | | | | | | | | |
| | 0380 | UNMMG Clinical Sales & Services | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 20,000.00 | | ☐ | 20,000.00 | 20,000.00 | ☐ |
| 5T | | Intra University Activities | | | | | | | | | | | | |
| | 1901 | Budgeted Use of Reserves | 8,080.00 | 0.00 | 0.00 | 0.00 | 8,080.00 | P | ( 10,000.00) | | ☐ | ( 18,080.00) | ( 10,000.00) | ☐ |
| 71 | | Operating Expense Other | | | | | | | | | | | | |
| | 50E0 | Lab Medical Supplies Gen | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| | 69Z0 | Other Professional Services Gen | 8,000.00 | 0.00 | 0.00 | 0.00 | 8,000.00 | P | 10,000.00 | | ☐ | 2,000.00 | 10,000.00 | ☐ |
| | 8045 | Interdepartmental Support | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | P | 0.00 | | ☐ | 0.00 | 0.00 | ☐ |
| | 80K0 | Banner Tax | 80.00 | 0.00 | 0.00 | 0.00 | 80.00 | P | 0.00 | | ☐ | ( 80.00) | 0.00 | ☐ |

*Summary Totals*

| Account Type | Account Type Title | Base Budget | Proposed Budget | New Budget | Cumulative Change |
|---|---|---|---|---|---|
| 51 | Operating Revenues | 0.00 | 20,000.00 | 20,000.00 | 20,000.00 |
| 5T | Intra University Activities | 8,080.00 | ( 10,000.00) | ( 10,000.00) | ( 18,080.00) |
| 50 | Revenues and Intra Univ Activities | 8,080.00 | 10,000.00 | 10,000.00 | 1,920.00 |
| | | | | | |
| 71 | Operating Expense Other | 8,080.00 | 10,000.00 | 10,000.00 | 1,920.00 |
| 70 | Other E | 8,080.00 | 10,000.00 | 10,000.00 | 1,920.00 |
| | Net | 0.00 | 0.00 | 0.00 | 0.00 |

**This index is in balance**

**Budgeting a Negative Amount to 1901 creates a surplus in this index.**

# BUDGET DEVELOPMENT REPORTS



- CLICK ON THE "BUDGET DEVELOPMENT REPORTS MENU"

# BUDGET DEVELOPMENT REPORTS (CONT.)

# Budget Development Reports
# Working Report

## Budget Development Reports Menu

**Budget Development Working Report - Budget Year**
Reports new year budget development and salary planner information in detail or summary by organization and/or index.

**Operating Budget Summary Report**
Reports income statement summary information by account type.

**Index Out-of-Balance Exception Report**
Reports indices within locked organizations where revenues less expenses does not net to zero.

**Organization Summary Report**
Reports income statement summary information by organization.

**Budgeted Account Code Report**
Reports budgeted indices by organization for a specific account.

**Budgeted Transfers/Allocations Report**
Reports budgeted summary by account for transfer and allocation accounts only

**Budgeted Account Code Totals Report**
Reports all Account Codes budgeted with summary totals by Account Type.

**Budgeted Index/Account Comments Report**
Reports budgeted Index code comments with subordinate Account code comments

**Budgeted Indices Not Modified Report**
Reports budgeted Index codes that have not been modified

# BUDGET PLANNER REPORTS WORKING REPORTS



- **ENTER THE APPROPRIATE INFORMATION IN CHART OF ACCOUNTS, BUDGET ID, BUDGET PHASE, AND ACCOUNT INDEX.**
- **CLICK "SUBMIT" TO VIEW THE REPORT**

**Executive Level:** AF VP Health Sciences Center
**Organization:** 523A SOM Surgery
**Fund Type Level 2:**
**Fund:**
**Program:**

| | | Appt Percent | Hiring Orgn | FY 2019-2020 Budget | Budgeted FTE |
|---|---|---|---|---|---|
| **523H0** | **Surgery Cardio** | | | | |
| Index: | 523007 Cardio-Thoracic I&G | | | | |
| **Allocations** | | | | | |
| 1640 | Allocations Pooled Allocation Gen | | | 121,604 | |
| | | | Revenue Total: | 121,604 | |
| **Labor Expense** | | | | | |
| 2000 | Faculty Salary Detail Gen | | | 47,441 | 1.05 |
| | -- Vacant Position -- | FY0103 | 100 % 523H | 33,736 | 1.00 |
| | | FY0269 | 100 % 523H | 13,705 | 0.05 |
| 2060 | Support Staff Salary Detail Gen | | | 74,125 | 1.98 |
| | | S04498 | 100 % 523H | 32,109 | 0.98 |
| | | S04877 | 100 % 523H | 42,016 | 1.00 |
| **Other Expense** | | | | | |
| 3100 | Office Supplies General | | | 38 | |
| | | | Expenditure Total: | 121,604 | |
| | | | 523007 Net: | 0 | |

# Budget Development Reports
# Operating Budget Summary



**LoboWeb**

## Budget Development Reports Menu

**Budget Development Working Report – Budget Year**
Reports new year budget development and salary planner information in detail or summary by organization and/or index.

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Reports budgeted Index codes that have not been modified

# OPERATING BUDGET SUMMARY
## NO APPROVED USE OF RESERVE

**UNIVERSITY OF NEW MEXICO**
OPERATING BUDGET SUMMARY for 2020-2021
Organization: 762A SOM Institute for Ethics
Fund: ; Fund Type Level 2:
Program:

## REVENUES

| | |
|---|---|
| Instruction and General | $59,483 |
| UNM Hospital Funding | $50,275 |
| Sales and Service | $6,100 |
| Other Revenues | $13,230 |
| Allocations and Transfers, net | $180,271 |
| **Total REVENUES** | **$309,359** |

## EXPENSES

### Compensation Costs

| | |
|---|---|
| Faculty Salary Detail | $115,113 |
| Other Salaries | $110,487 |
| Payroll Benefits | $21,318 |
| **Total Compensation Costs** | **$246,918** |

### Non-Salary Expenses

| | |
|---|---|
| Supplies | $14,700 |
| Travel | $10,694 |
| Communication Charges | $3,516 |
| Services | $22,035 |
| Plant Maintenance | $3,950 |
| Other Expense | $7,028 |
| Banner Tax | $518 |
| **Total Non-Salary Expenses** | **$62,441** |
| **Total EXPENSES** | **$309,359** |
| **NET MARGIN** | **$0** |
| **Budgeted Use of Reserves** | **$0** |
| **NET RESERVES** | **$0** |

# OPERATING BUDGET SUMMARY

## WITH APPROVED USE OF RESERVE

UNIVERSITY OF NEW MEXICO
OPERATING BUDGET SUMMARY for 2020-2021
Organization: 794A  Obstetrics Gyne
Fund:  ; Fund Type Level 2:
Program:

**REVENUES**

| | |
|---|---|
| Instruction and General | $1,656,035 |
| UNMMG Revenues | $6,523,903 |
| UNM Hospital Funding | $1,369,709 |
| CRTC Patient Rev Net of Allowance | $164,965 |
| Other Patient Service | $680,093 |
| Grant and Contract Revenues | $70,371 |
| F and A Return | $24,935 |
| Sales and Service | $2,000 |
| Other Revenues | ($331,292) |
| Allocations and Transfers, net | $86,071 |
| **Total REVENUES** | **$10,246,790** |

**EXPENSES**

**Compensation Costs**

| | |
|---|---|
| Faculty Salary Detail | $4,498,037 |
| Faculty Incentive | $468,842 |
| Salary Adjustments | $338,388 |
| Other Salaries | $2,591,863 |
| Payroll Benefits | $1,562,550 |
| **Total Compensation Costs** | **$9,459,680** |

**Non-Salary Expenses**

| | |
|---|---|
| Supplies | $326,324 |
| Travel | $198,064 |
| Student Costs | $2,300 |
| Research Costs | $40,055 |
| Communication Charges | $51,000 |
| Services | $154,535 |
| Plant Maintenance | $48,820 |
| Patient Care Expense | $9,950 |
| Other Expense | $48,133 |
| F and A Expense | $4,819 |
| Banner Tax | $9,424 |
| Capital Expenditures | $30,686 |
| **Total Non-Salary Expenses** | **$924,110** |
| **Total EXPENSES** | **$10,383,790** |
| **NET MARGIN** | **($137,000)** |
| **Budgeted Use of Reserves** | **$137,000** |
| **NET RESERVES** | **$0** |

# THANK YOU!