

# **FY22 BUDGET BUILD KICKOFF BUDGET PLANNER OVERVIEW**

MARCH 15, 2021



# Overview Objectives

## Timeline

- Critical events and dates

## Process & System Overview

- Shared Salaries
- Salary Planner Overview
- Budget Development Business Rules
- Key points and reminders

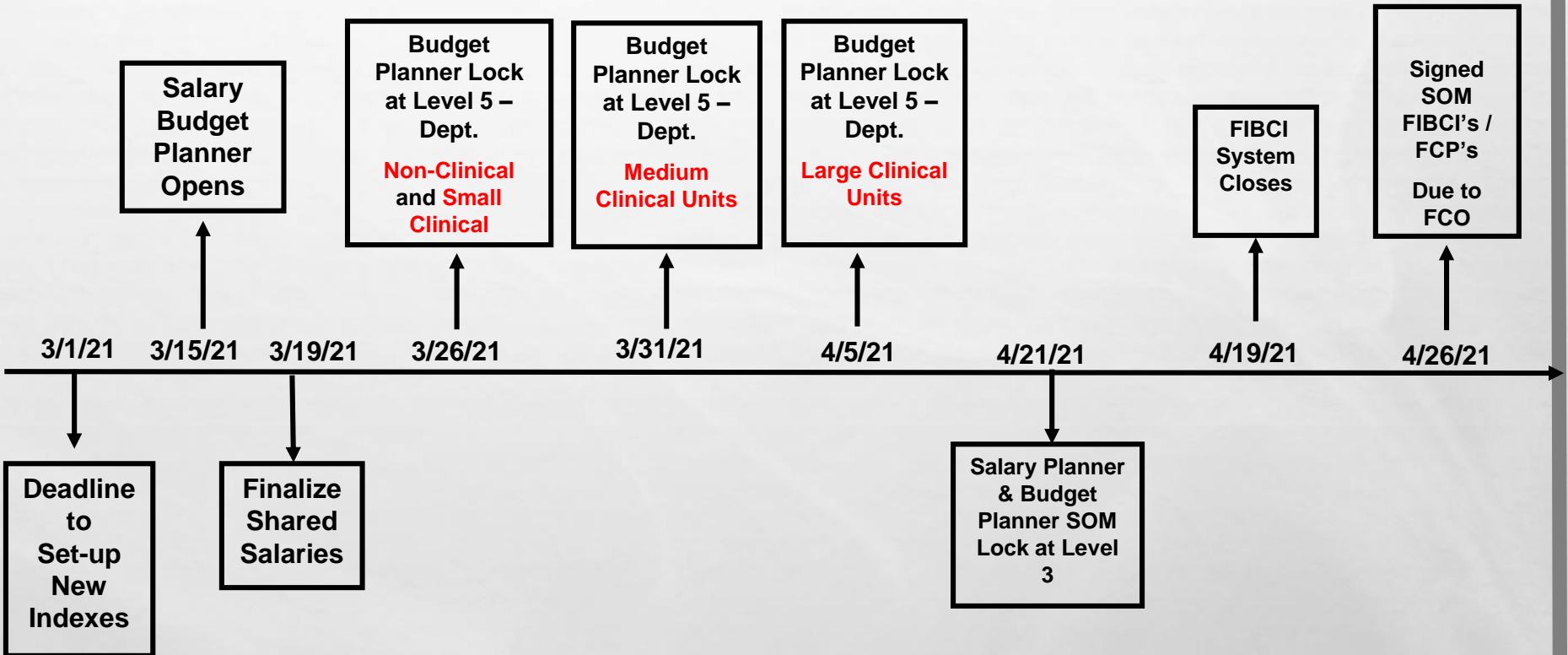
## Resources

- Contacts and Online Resources

## New Users

- Budget Planner Overview / Refresher

# TIMELINE FOR FY22 BUDGET BUILD



# SOM LOCK DATES

## MARCH 26TH

### NON-CLINICAL AND SMALL CLINICAL:

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

## MARCH 31ST

### MEDIUM CLINICAL:

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

## APRIL 5TH

### LARGE CLINICAL:

CANCER CENTER  
INTERNAL MEDICINE  
PEDIATRICS  
PSYCHIATRY  
SURGERY

# **HSC NON-SOM UNITS LOCK DATES**

- **HSC Administration / PPD / UNMMG**      **April 16th**
- **HSC CON/COP/HSLIC**      **April 19th**

# LAB WORKING SESSIONS

## Zoom Sessions

(Drop in anytime during these days/times)

- Monday, March 22<sup>nd</sup> 10:00 am - Noon
- Wednesday, March 24<sup>th</sup> 10:00 am - Noon
- Thursday, March 25<sup>th</sup> 1:00 pm – 3:00 pm

**(ZOOM link will be emailed on list-serve the week of these sessions)**

# Faculty Contracts Office (FCO)

**SOM FIBCI** (FY22 opened for entry February 15<sup>th</sup> - closes on April 19<sup>th</sup>)

- Signed FIBCI's due to HSC FCO **April 26, 2021 at 5:00 PM**

**COP FIBCI** (FY22 opened for entry February 15<sup>th</sup> - closes on May 10<sup>th</sup>)

- Signed FIBCI's due to HSC FCO **May 17, 2021 at 5:00 PM**

**CON FCP** (FY22 opened for entry February 15<sup>th</sup> - closes on May 10<sup>th</sup>)

- Signed FCP's due to HSC FCO **May 17, 2021 at 5:00 PM**

**Remember!** Salary reflected in Salary Planner must equal contract salary (Base plus Supplement) as reflected on the FY22 FIBCI/FCP.



# Shared Salaries



- Must be finalized between departments by March 19, 2021



# 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



## FSRSLSH - HSC Shared Salary Report

### Report Criteria:

SEGMENT	LEVEL	WILD
ORGANIZATION	LEVEL 5	997A*





Organization	Description	Level
997A	997A : Pediatrics	5



### SELECTED ORGANIZATION OF SHARED INDEX




ORGANIZATION\_LEVEL\_5: 997A : Pediatrics

FISCAL YEAR	LEVEL OF SHARED ORGANIZATION
Prior Month's Fiscal Year	ALL

Select type of display output


☒ Excel 2007
 
☐ HTML


☐ PDF
 
☐ HTML Active Report

**FSRSLSH-HSC Salary Planner Shared Salary**  
**Index Organization Level 5 '997A' Fiscal Year**

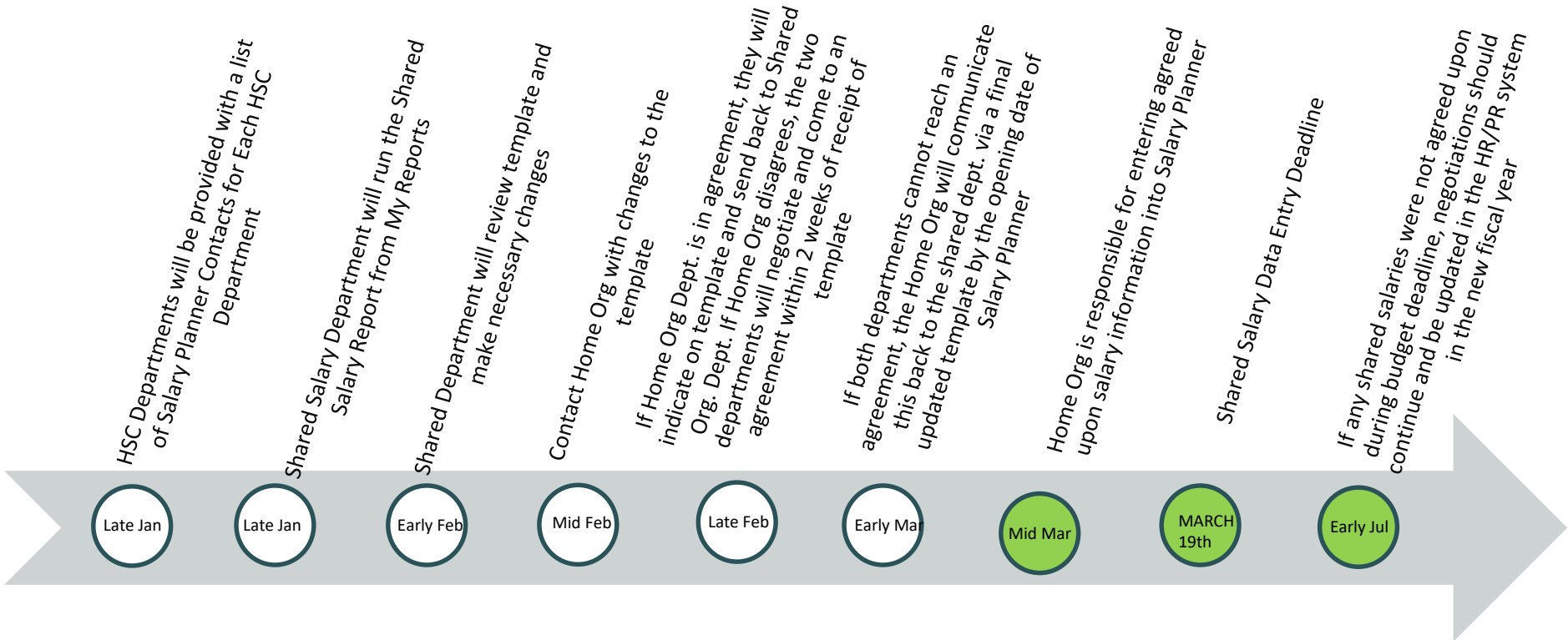
Share Department Changes for Future  
Fiscal Year Budget

Name Department Changes  
Confirmations/Changes

Name Org Desc	Name Org	Acct	Employee	Position	Suffi	Fun Type	Shared Index	%	Annual Salary	Budget Amount	Revised Labor Distributed	Revised Job Annual Salary	Revised Total Budgeted	Revised Labor Distributed	Revised Job Annual Salary	Revised Total Budgeted
											%	Prepared	to Index	%	Prepared	to Index
<b>Index Organization Level 5 : 997A-Pediatrics</b>																
Colloqe of Nursing	AFD	2000	UNMEmployee	FY1063	00	CRHSC	9972AJ	10.00	100,000.00	10,000						
Colloqe of Nursing	AFD	2000	UNMEmployee	FY0469	00	CRHSC	9972AC	13.04	141,800.00	18,491						
Colloqe of Nursing	AFD	2000	UNMEmployee	FY0599	00	CRHSC	9972AJ	10.00	100,000.00	10,000						
Colloqe of Nursing	AFD	2000	UNMEmployee	FY0723	00	CRHSC	9972AJ	15.00	118,800.00	17,820						
Anthropology Department	045A	2000	UNMEmployee	FY2369	00	CRHSC	9972DS	43.34	52,500.00	22,754						
COP Pharmacy Practice & Admin Scien	511A	2000	UNMEmployee	FY0802	00	CRHSC	9972AC	22.53	111,491.47	25,119						
COP Pharmacy Practice & Admin Scien	511A	2000	UNMEmployee	FY0802	00	CUHSC	997197	22.52	111,491.47	25,108						
COP Pharmacy Practice & Admin Scien	511A	2007	UNMEmployee	FTW073	00	CRHSC	497459	32.00	35,079.87	11,226						
COPH Deane Office	304A	2000	UNMEmployee	FE0137	00	CRHSC	9972F4	3.00	260,000.00	7,800						
ORTC Population Sci Academic Unit	099Z1	2020	UNMEmployee	S09546	00	CRHSC	9972F4	20.00	60,919.38	12,184						
Medical Oncology	099S1	2000	UNMEmployee	FY1424	00	CUHSC	9972ET	24.73	228,866.00	56,599						
Dirpute Resolution	398A	2020	UNMEmployee	S09739	00	CRHSC	9972CJ	8.34	45,000.00	3,753						
Dirpute Resolution	398A	2020	UNMEmployee	S09739	00	CRHSC	9972CK	8.33	45,000.00	3,749						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY2189	00	CRHSC	9972F4	5.00	96,000.00	4,800						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY1512	00	CRHSC	497459	100.00	33,861.52	33,862						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY2331	00	CRHSC	9972F4	15.00	87,450.59	13,118						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY0790	00	CRHSC	9971FF	5.00	105,478.74	5,274						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY0790	00	CRMain	9971WV	5.00	105,478.74	5,274						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY0848	00	CRHSC	9972DR	4.80	195,999.08	9,408						
Family Community Medicine FCM	160B	2000	UNMEmployee	FY0848	00	CRHSC	9972DS	4.80	195,999.08	9,408						
HS Library and Informatic Ctr	483A	2040	UNMEmployee	S01644	00	CUHSC	997590	100.00	46,115.16	46,115						
IM Div of Epidemiology	851H	2000	UNMEmployee	FY1060	00	CRHSC	9972F4	20.00	100,000.00	20,000						
Neurology Child	490C	2000	UNMEmployee	FY0596	00	CRHSC	9972CK	10.00	222,634.76	22,263						
Neurology Child	490C	2000	UNMEmployee	FY0411	00	CRHSC	9972CJ	1.00	176,942.06	1,769						
Neurology Child	490C	2000	UNMEmployee	FY0411	00	CRHSC	9972CK	69.00	176,942.06	122,090						
Neurology Child	490C	2000	UNMEmployee	FY0411	00	CRHSC	9972CM	1.00	176,942.06	1,769						
OB GYN Maternal Fetal Medicine	794D	2020	UNMEmployee	S08909	00	CRHSC	9972CP	10.00	72,000.00	7,200						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY0382	00	CUHSC	997117	25.00	207,153.00	51,788						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY1128	00	CRHSC	9972CK	15.00	97,100.00	14,565						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY0821	00	CUHSC	997117	12.50	196,097.00	24,512						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY0821	00	CUHSC	997994	12.50	196,097.00	24,512						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY2667	00	CRHSC	9972GK	10.00	81,000.00	8,100						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY0447	00	CUHSC	99706Y	50.00	81,000.00	40,500						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY0447	01	CUHSC	99706Y	50.00	.00	0						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY2541	00	CRHSC	9972D2	50.00	20,500.00	10,250						
Psych Child Adolescent Div C A	451C	2000	UNMEmployee	FY2543	00	CRHSC	9972DM	100.00	20,500.00	20,500						
Psych Community Behavioral Health	451E	2000	UNMEmployee	FY0040	00	CRHSC	9972GK	1.00	101,000.00	1,010						
Psych Community Behavioral Health	451E	2007	UNMEmployee	FTW010	00	CRHSC	9972CK	100.00	8,913.25	8,913						
Psych Community Behavioral Health	451E	2020	UNMEmployee	S09194	00	CRHSC	9972GK	5.00	51,249.92	2,563						
Psych Community Behavioral Health	451E	2060	UNMEmployee	S08649	00	CRHSC	9972GK	25.00	19,379.88	4,845						
Psych Neuropsychology	451H	2000	UNMEmployee	FY0753	00	CUHSC	9971F8	3.28	131,796.00	4,323						
Psych Neuropsychology	451H	2000	UNMEmployee	FY0669	00	CRHSC	9971W1	30.00	52,400.00	15,720						
Psych Neuropsychology	451H	2000	UNMEmployee	FY0669	00	CUHSC	9970S3	30.00	52,400.00	15,720						

**997A Employee Count: 34**

# Shared Salary Timeline

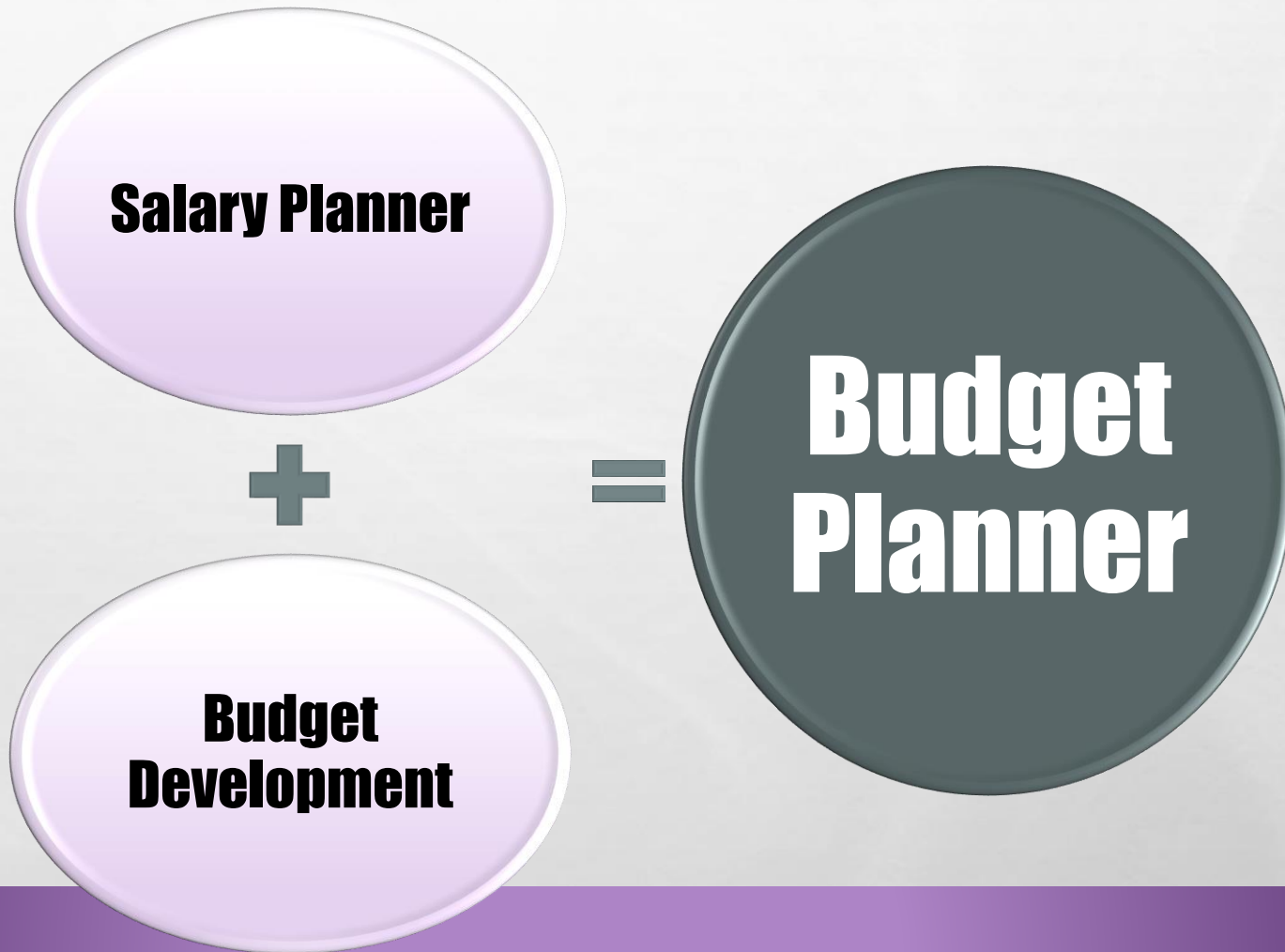


# **The Budget Planner System**

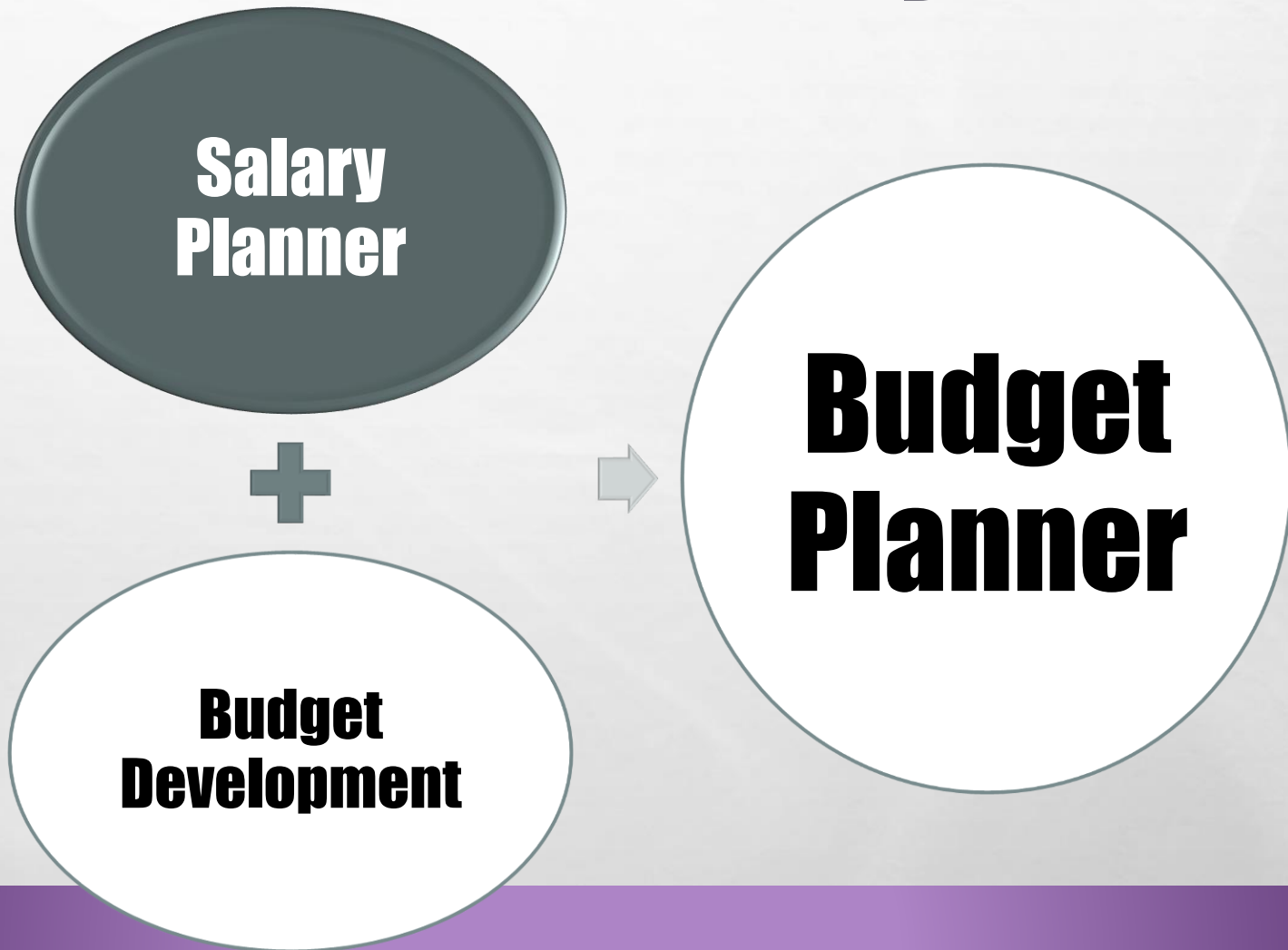




# Budget Planner System



# Salary Planner



# SALARY PLANNER MENU

[Student](#)[Financial Aid](#)[Employee](#)[Payment](#)[Finance](#)[Department Forms](#)

Search

Go



## 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

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

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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# EDIT SCENARIO

## Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

### Scenario Selection

Extract ID: 12FAC22

Scenario: 12FAC21  
12FAC22  
9FAC21

### Filter Criteria

By Position

By Employee Name

Select

RELEASE: 8.

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THERE ARE NINE (8) SCENARIOS FOR DEPARTMENTS TO SELECT FROM  
\*Extract ID and Scenario must be selected in combination as listed below\*

Extract ID:	Scenario:
12FAC22	12_MO_FACULTY_22
9FAC22	9_MO_FACULTY_22
HSTAFF22	HOUSESTAFF_22
RSTAFF22	REG STAFF_22
POOL22	POOLED_POSITIONS_22
CSTAFF22	CONTRACT_STAFF_22

### UNION SCENARIOS

CWA22	CWA_BARG_UNIT_22
USUNM22	USUNM_BARG_UNIT_22

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

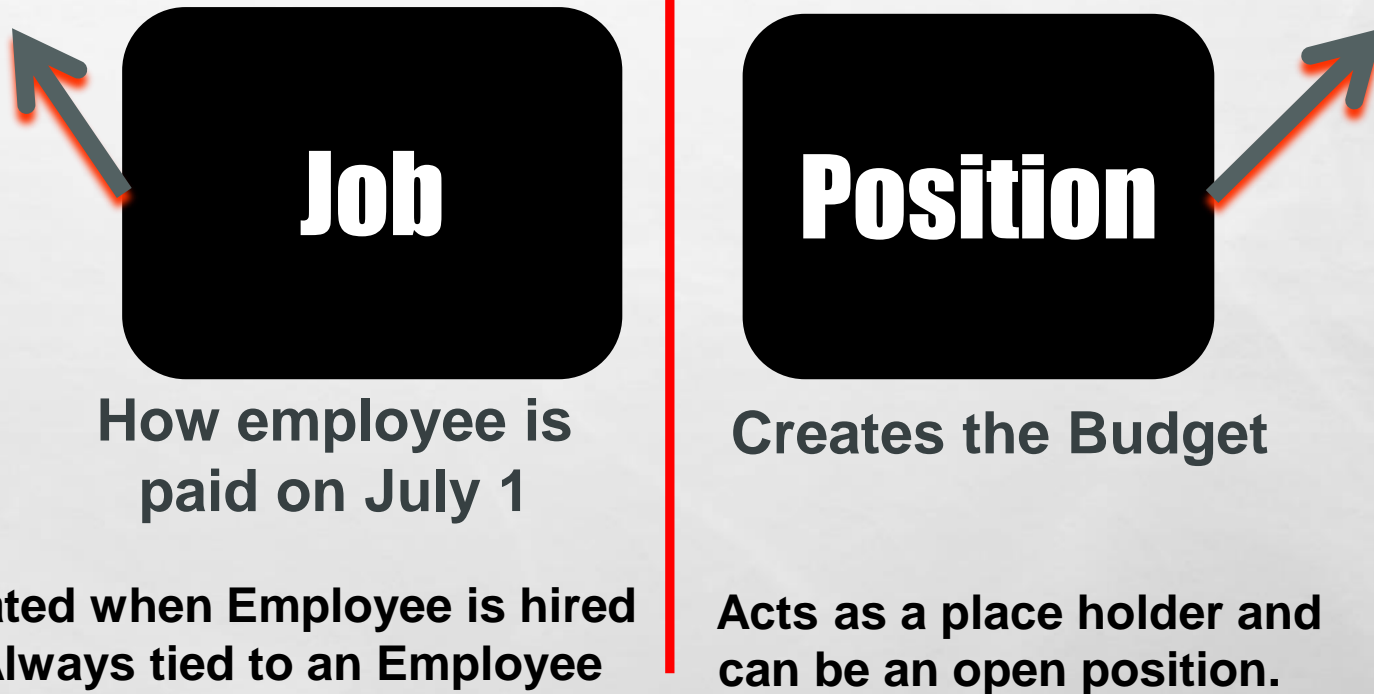
**Only use scenarios ending in '22' for this budget cycle!**

# **SALARY PLANNER**

## **JOB VS. POSITION**

**HR**

**Budget**



**Note: If the employee is on any Restricted awards, then you must budget on both sides in order to get to 100% distribution**

**\*Does not affect or change Grant budget \***



# VS.

# POSITION

**Job side is tied to a person.  
Name and ID appear as the record  
header.**

**Position side is tied to the position/budget and reflects a position number.**

**Name and ID:** Yvette B Hall 100011183  
**Position-Suffix and Title:** S08718-00 Financial Analyst  
**EPAF Transaction #:**

**Budget Distribution for Position S08718 Financial Analyst.**

**Current**

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
U	043479	3U0044	043J	2020	P111	GNACTV			
									Total

Add New Record

### ***Proposed Position Distribution***

[illegible]**Current**[illegible]

***Proposed***

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

Add New Record

**Current Incumbent**

**Name and ID:** Yvette B Hall 100011183  
**Position-Suffix and Title:** S08718-00 Financial Analyst

[illegible]

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

## 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]  
EPAF 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				

Verify that the index and account code on the Position & Job are the same!

### 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

### 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

All Labor Distributions on both the job and the position must equal 100%

When you update an Index remember that the index must be a **valid FY22 index**. If not, the nightly refresh process will drop that index.

The last refresh will be the night of **April 19<sup>th</sup>**.

# SALARY PLANNER

## -WARNING TO USERS

As many of us put a 4% increase for staff last year, work will need to be done to reset the position budget back to the current salary. Please plan for extra time in Salary Planner to get the job and position back in sync before making additional changes.

### 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:

[Jump to Bottom](#)

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 Salary	Extract Status
	<a href="#">S01977 - 00 Medical Practice Specialist</a>	100.00	53,747.16	100.00	100.00	53,747.16	.00	.00	53,747.16	

List by Employee has Base Salary listed as current salary.

### List By Position

Enter a Mass Change and select Mass Apply, or modify an individual position and select Save. Rounding applies to Mass Changes and individual position changes.

#### Update of Budget Development

Chart of Account: U  
Budget ID: BUD22  
Budget Phase: ADOPTD

#### Mass Change

Percent:   
Amount:

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Proposed Salary	Links	Extract Status	Exclude from Totals
<a href="#">Medical Practice Specialist, Sr</a>	100.00	100.00	1	1	55,897.00	.00	.00	55,897.00		53,747.16	<a href="#">Employee</a> <a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		No

List by Position has the Proposed Budget at last year's budgeted amount.

# **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
<a href="#">FY0056 Clinician Ed - Professor</a>	100.00	100.00	0	0	.00	.00	.00	.00		.00	<a href="#">Distribution Comments Employee</a>		<input type="checkbox"/>

**⚠ 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

## FACULTY EXAMPLE – 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:

Position-Suffix and Title:

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
U	624000	3U0044	624C0	2000	P101	GNACTV				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

Job  
needs to  
be  
updated  
to match  
position!

Save

Copy Position Distribution to Job

Update Budget

- 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

## FACULTY EXAMPLE – ADD INCENTIVE

### 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

#### Proposed

Position Side Includes Incentive

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

#### Current Incumbent

Name and ID:

Position-Suffix and Title:

Job Side Does Not Include Incentive

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

**Note: Percentages no longer match (this is ok)**

# ZERO OUT A POSITION BUDGET

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

myUNM

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
<a href="#">FY0160 Research Assoc Professor</a>	100.00	100.00	0	0	.00	.00	.00	.00		.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
<a href="#">FY1015 Research Professor</a>	100.00	100.00	.85	.85	102,479.00	0.00	0.00	102479.00		117,971.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		<input type="checkbox"/>
<a href="#">FY1101 Research Asst Professor</a>	100.00	100.00	.5	.5	48,900.00	-100.00	-48900.00	0.00		.00	<a href="#">Distribution</a> <a href="#">Comments</a>		<input type="checkbox"/>
<a href="#">FY1607 Research Asst Professor</a>	100.00	100.00	0	0	.00	.00	.00	.00					
Total:			1.35	1.35	151,379.00	.00	.00	151,379.00					

**Summary**

Organization	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount
<a href="#">023A - SOE Mechanical Engineering</a>			1.35	1.35	151,379.00	.00	.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.

# 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						
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	Ext Sta
	<a href="#">S09333 - 00</a> <a href="#">Coord,Education Support</a>	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 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	<input type="text"/>	<input type="text"/>	Yes

[Jump to Bottom](#)

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

		Employee Totals		Department Totals							
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	Extract Status	Excluded from Totals
	<a href="#">S04847 - 00 Program Manager</a>	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.

# CHANGE IN APPOINTMENT PERCENTAGE

		Employee Totals		Department Totals							
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	Extract Status	Excluded from Totals
<a href="#">100006344 Archuleta, Marvin T.</a>	<a href="#">S02182 - 00 Accountant 2</a>	100.00	45,426.07	100.00	100.00	44,318.12	2.50	1,107.95	45,426.07	Changed	
<a href="#">100479171 Beenhouwer, Kyle</a>	<a href="#">S06529 - 01 Student Success Specialist</a>	100.00	38,850.00	100.00	100.00	36,999.96	2.50	925.00	37,924.96	Changed	
<a href="#">101499905 Hatcher, James C.</a>	<a href="#">S06887 - 00 Sr IT Support Tech</a>	100.00	36,598.65	100.00	100.00	35,706.00	2.50	892.65	36,598.65	Changed	
<a href="#">100251717 Holub, Justin M.</a>	<a href="#">S09090 - 00 Coord,Education Support</a>	100.00	33,046.00	100.00	100.00	32,240.00	2.50	806.00	33,046.00	Changed	
<a href="#">100010481 Holub, Paula R.</a>	<a href="#">S03276 - 00 Academic Opns Ofcr</a>	100.00	90,948.42	100.00	100.00	88,730.17	2.50	2,218.25	90,948.42	Changed	
<a href="#">101663334 Ibrahim, Olla A.</a>	<a href="#">S09177 - 00 Student Success Specialist</a>	100.00	38,665.00	100.00	100.00	36,999.96	2.50	925.00	37,924.96	Changed	
<a href="#">100013675 Lofton, Ramsey A.</a>	<a href="#">S04376 - 00 Supv,Community Ed Programs</a>	100.00	53,483.13	75.00	100.00	49,134.00	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!**



# NEW POSITION NUMBER BUT OLD POSITION NUMBER EXISTS

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

## Budget Distribution for Position S08880 Executive Assistant.

### Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	296000	3U0044	296A	2020	P131	GNACTV				100.00	.00
Total										100.00	.00

### Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Del
U	296000	3U0044	296A	2020	P131	GNACTV				100.00	.00	X
Total										100.00	.00	

Add New Record

### Current Incumbent

Name and ID:

Alexander, Jewel Joseph 101612587

Position-Suffix and Title: S08880-00 Executive Assistant

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	296000	3U0044	296A	2020	P131	GNACTV				100.00	61,800.00
Total										100.00	61,800.00

[Position Detail](#)

[List By Employee](#) | [List By Position](#) | [Summary Totals](#)

**Budget Distribution for Position S11516 Executive Assistant.**

**Current**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	296000	3U0044	296A	2020	P131	GNACTV				100.00	59,800.00
Total										100.00	59,800.00

**Proposed**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Del
U	296000	3U0044	296A	2020	P131	GNACTV				100.00	59,800.00	X
Total										100.00	59,800.00	

Add New Record

⚠ This Position has no incumbents

FUND:	Program:	Appt Percent	Hiring Orgn	FY 2021-2022 Budget	Budgeted FTE	
296A	Vice Chancellor for Diversity					
Index:	296000 HSC Diversity					
Allocations						
1640	Allocations Pooled Allocation Gen			881,620		
Revenue Total:				881,620		
Labor Expense						
2000	Faculty Salary Detail Gen			275,557	1.23	
	Crandall, Cameron	FY0780	100 %	558B	15,371	0.05
	Culbreath, Karissa	FY2253	10 %	254B	15,750	0.10
	Gonzales, Melissa	FY0910	80 %	851H	29,728	0.16
	Romero-Leggott, Valerie	FE0040	100 %	160A	197,855	0.72
	Smart, Lindsay	FY2123	100 %	451E	16,853	0.20
2020	Administrative Professional Gen			59,800	20.80	
	-- Vacant Position --	S11516	100 %	296A	59,800	1.00
	Arguelles, Laura	S06925	100 %	296A	48,672	1.00
	Collier, Stacy	S06925	100 %	296A	48,672	1.00
	Garcia, Erin	S08010	100 %	296A	27,491	0.51
	Kinsman, Karen	S00676	100 %	296A	41,308	0.50
	Madrid, Teresa	S11272	100 %	296A	78,822	1.00
	Munoz, Octavio	S02036	100 %	296A	51,823	0.90
	Romero, Steven	S11089	100 %	296A	67,164	1.00
2060	Support Staff Salary Detail Gen			43,185	1.00	
	Samudio, Rose	S09042	100 %	296A	43,185	1.00
20FI	Faculty Incentive Adjustments			6,000	0.00	
20J0	Student Salaries Gen			9,000	0.50	
	-- Pooled Position -- UB0882	UB0882	100 %	296A	9,000	0.50
20L0	Federal Workstudy Gen			6,616	0.51	
	-- Pooled Position -- UF0853	UF0853	100 %	296A	6,616	0.51



# JOB VS POSITION

- A “JOB” IS TIED TO AN ACTUAL PERSON WITH A BANNER ID. A POSITION IS PLACEHOLDER TO BE ABLE TO FILL THAT TITLE AT A LATER TIME.

S08880 Executive Assistant	100.00	100.00	0	0	.00	.00	.00	.00	61,800.00	Distribution Comments Employee	No
S08950 Teacher,Pre-College Programs	100.00	100.00	1	1	.00	.00	.00	.00	.00	Distribution Comments Employee	No
S08984 Program Specialist	100.00	100.00	1	1	39,933.00	.00	.00	39,933.00	38,396.80	Distribution Comments Employee	No
S09258 Web Designer	100.00	100.00	47.5	47.5	18,928.00	.00	.00	18,928.00	36,400.00	Distribution Comments Employee	No
S09351 Education & Outreach Mgr	100.00	100.00	0	0	.00	.00	.00	.00	.00	Distribution Comments Employee	No
S09627 Sr Program Manager	100.00	100.00	1	1	48,866.00	.00	.00	48,866.00	.00	Distribution Comments Employee	No
S11073 Sr Research Scientist 2	100.00	100.00	1	1	51,166.00	.00	.00	51,166.00	.00	Distribution Comments Employee	No
S11080 Program Specialist	100.00	100.00	1	1	45,390.00	.00	.00	45,390.00	45,835.08	Distribution Comments Employee	No
S11089 Sr Business Mgr	100.00	100.00	1	1	67,164.00	.00	.00	67,164.00	69,101.64	Distribution Comments Employee	No
S11272 Education & Outreach Mgr	100.00	100.00	1	1	78,822.00	.00	.00	78,822.00	75,790.20	Distribution Comments Employee	No
S11313 Program Manager	100.00	100.00	1	1	.00	.00	.00	.00	55,500.00	Distribution Comments Employee	No
S11514 Program Specialist	100.00	100.00	1	1	.00	.00	.00	.00	.00	Distribution Comments Employee	No
S11516 Executive Assistant	100.00	100.00	1	1	59,800.00	.00	.00	59,800.00	.00	Distribution Comments Employee	No

# LIST BY POSITION

## 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.

### List By Position

Enter a Mass Change and select Mass Apply, or modify an individual position and select Save. Rounding applies to Mass Changes and individual position changes.

#### Update of Budget Development

Chart of Account: U  
Budget ID: BUD21  
Budget Phase: ADOPTD

Mass Change 22.

Percent:   
Amount:

Mass Apply

[Jump to Bottom](#)

#### 490A - Neurology, Locked

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Proposed Salary	Links	Extract Status	Exclude from Totals
<a href="#">Clinician Ed-Assist Prof</a>	100.00	100.00	1	0	169,983.00	-100.00	-169,983.00	.00		.00	<a href="#">Distribution</a> <a href="#">Comments</a> <a href="#">Employee</a>		No

Example of student pool position. The Proposed FTE should be evaluated for appropriate FTE equiv.

<a href="#">UF0570</a> <a href="#">#Student Entry Level</a>	100.00	100.00	1	1	.00	#####	6,485.00	6,485.00		.00	<a href="#">Distribution</a> <a href="#">Comments*</a> <a href="#">Employee</a>		No
--	--------	--------	---	---	-----	-------	----------	----------	--	-----	---	--	----

# POSITION DETAIL SCREEN

## Position Detail

### Update of Budget Development


Chart of Account: U  
Budget ID: BUD: 22  
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

## POOLED POSITION

Example : Incorrect FTE and Salary listed for pooled 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:	<input type="checkbox"/>		

***Position***

**Organization:**

**Type:** Pooled

# SALARY PLANNER REPORTS



## Salary Planner Reports Menu

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### **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, by index, should be in sync with position distribution .

If reason is other than incentive amount (2005, 200G or 200H),  
**please correct, or explain the reason in the comments.**

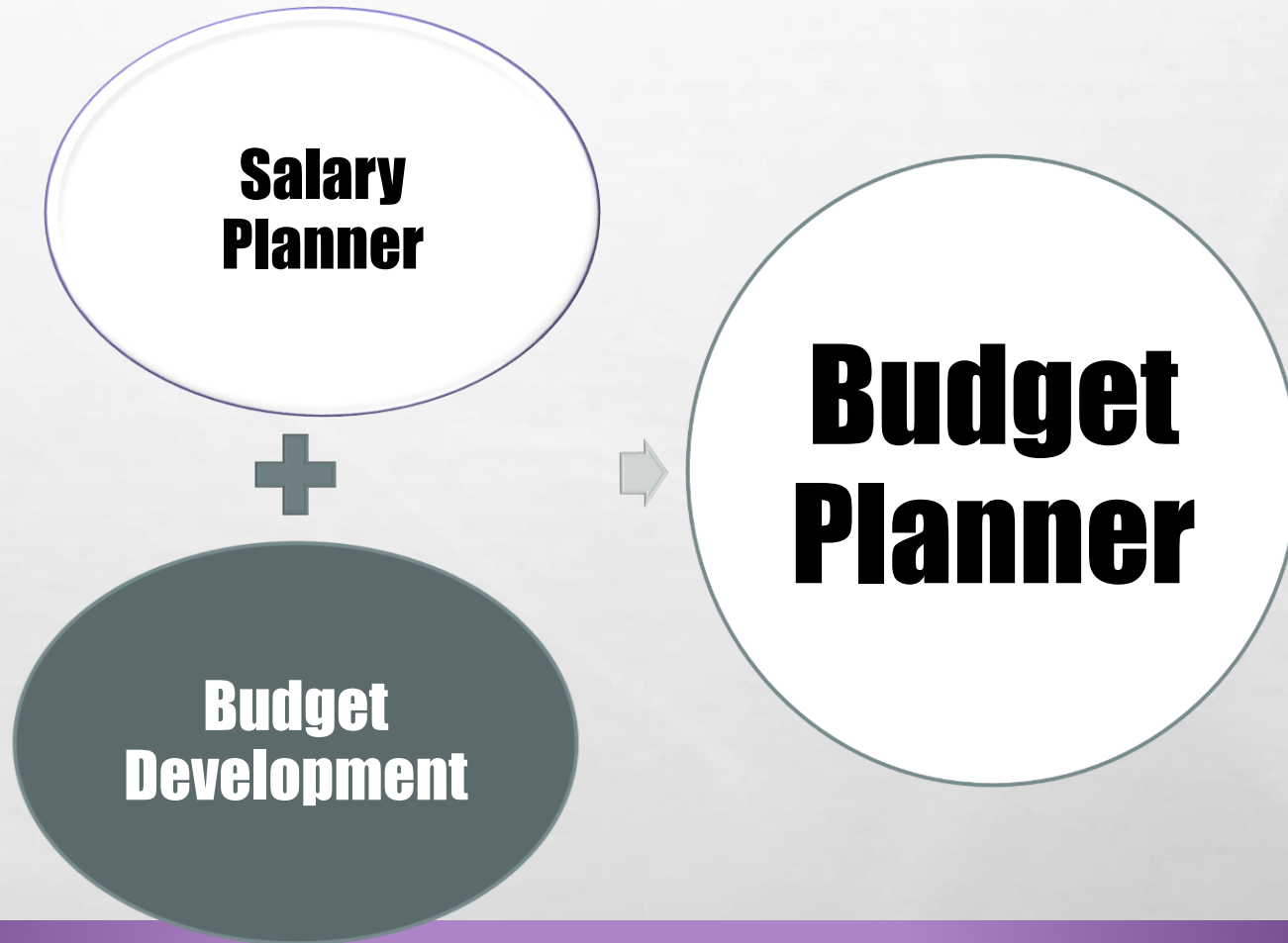


UNIVERSITY OF NEW MEXICO  
SALARY PLANNER WORKING REPORT for 2020-2021  
Organization: 043A - School of Medicine Deans Office ; include vacant positions: Y  
Index: - ; Fund: -

Account	Employee Name	Position, Suffix, Title	Hiring Org	Performance Rating	Posn Budget	Index	Current Labor Distribution %	Amount	FTE	Index	Proposed Labor Distribution %	Amount	FTE	Change Amt	Change %
2020	* Vacant Position	S06807 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 Emplmnt 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





# **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: BUD22**  
**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 EACH SCHEDULE BECOMES AVAILABLE.

**NOTE: REVENUE MUST MATCH AMOUNTS ON YOUR SCHEDULES**

- SOM CHECKLIST (REVIEWED BY SOM FINANCE OFFICE)
- UNMMG REVENUE SCORECARD
- DEAN'S ALLOCATIONS / I&G ALLOCATIONS
- APPROVED MARGIN – BUILD TO \$0, UNLESS YOU RECEIVE OFFICIAL APPROVAL FROM KRISTIN FOR ANY OTHER AMOUNT.
- F&A DISTRIBUTION
- ENDOWED FUNDING DISTRIBUTION GUIDELINES
- SALARY AGREEMENTS AND MID-LEVEL PASS THROUGHs WITH HOSPITAL

# SOM CHECKLIST

1	<b>Closeout Checklist</b>		
2	<b>Department Name:</b>		
3	<b>Reviewer:</b>		
4	<b>Date:</b>		
5	<b>Salary Planner</b>		
6	Generate and Save:		
7			
8	Baseline	Final	
9			Salary Planner Working Report
10			Salary Planner Exception Report
11			Vacant Position Report
12			Salary Planner Position Report
13			
14	<b>In MyReports</b>		
15	Generate and Save:		
16			
17			Unrestricted Balances by Index through prior month and prior year
18			Operating Ledger Summary prior month and prior Year end 6/30/XX
19			
20	<b>EPRINT</b>		
21	Generate and Save:		
22			Index Hierarchy Report
23	<b>Budget Planner</b>		
24	Generate and Save:		
25			
26	Baseline	Final	
27			Budgeted Account Code Totals Report
28			Index out of Balance
29			Operating Budget Summary
30			Budget Development Working Report-w/ Postion Detail
31			Budgeted Transfer/Allocations Report

Labor Distribution and Position Distribution should be 100%

Use in analysis of 1901

Use in analysis of FB, 1901 and Misc revenues

Use to determine current unrestricted indices under your org

Should net to target margin

Any indices out of balance should be balanced

Should net to target margin

## Run Baseline Reports Before You Begin

# 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 and which account codes to use.
- **Allocations (16xx) must zero out by fund unless its an external allocation.**
- **RUN BUDGETED ACCOUNT CODE REPORT, BY FUND, TO MAKE SURE YOUR ALLOCATIONS ZERO OUT.**
- If allocation is 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 FOR EACH**

**Don't forget:**

**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 FY22 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

- **Target Margins - Your Target Margin is \$0, unless you have been notified otherwise by the Dean's Office.**
- **1901 (*Budgeted Use of Reserves*)**  
***Note: only to be used between indices with available reserves and/or for approved amounts only***
- **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.
- If the position is available to budget for an employee sitting in that position use, please use it to budget the salary.
- 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 30,2021.

# 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).
- Utilize the open lab Zoom sessions for one-on-one assistance.
- Discuss unique circumstances with Kristin Gates (SOM departments) or HSC Budget Office (all other departments and colleges).

# WHEN YOU ARE DONE

1	<b>Closeout Checklist</b>		
2	<b>Department Name:</b>		
3	<b>Reviewer:</b>		
4	<b>Date:</b>		
5	<b>Salary Planner</b>		
6	Generate and Save:		
7			
8	Baseline	Final	
9			Salary Planner Working Report
10			Salary Planner Exception Report
11			Vacant Position Report
12			Salary Planner Position Report
13			
14	<b>In MyReports</b>		
15	Generate and Save:		
16			
17			Unrestricted Balances by Index through prior month and prior year
18			Operating Ledger Summary prior month and prior Year end 6/30/XX
19			
20	<b>EPRINT</b>		
21	Generate and Save:		
22			Index Hierarchy Report
23	<b>Budget Planner</b>		
24	Generate and Save:		
25			
26	Baseline	Final	
27			Budgeted Account Code Totals Report
28			Index out of Balance
29			Operating Budget Summary
30			Budget Development Working Report-w/ Postion Detail
31			Budgeted Transfer/Allocations Report

Labor Distribution and Position Distribution should be 100%

Use in analysis of 1901

Use in analysis of FB, 1901 and Misc revenues

Use to determine current unrestricted indices under your org

Should net to target margin

Any indices out of balance should be balanced

Should net to target margin

## Run Final Reports

# SOM CHECKLIST

		Acct	Description	Target
38		0720	State Appropriation	Should tie to State Appropriations Letter
39		0740	State Appropriation	Should tie to State Appropriations Letter
40		0750	State Appropriation	Should tie to State Appropriations Letter
41		1100	State Appropriation F&A Administrative Overhead Charge	Should tie F&A State Appropriations Letter
42		1640	I&G	Should tie to Dean's I&G Allocation sheet
43		1601	F&A	Should tie to SOM F&A Summary
44		1610	Dean's Allocations	Should tie to Dept Rept of Allocations
45		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
46		0340	UH allocation	Should tie to Dean's Allocation (plus Sal Agrmts/Other MOU's)
47		0341	UH allocation run by level 5 Org and by fund	Should net to zero and only be in Fund 3U0034 Indices
48		0380	UNMMG Purchased Service less Special Arrangement (SA)	Must tie to UNMMG template less Special Arrangements
49		0381	Allocation of UNMMG non SA	Should net to zero and only between Funds 3U0032 and 3U0033
50		0390	UNMMG Purchased Service SA	Must tie to UNMMG template for Special Arrangements
51		0391	Allocation of UNMMG SA	Should net zero and only between Funds 3U0032 and 3U0032
52		07D0	Santa Fe Tax for clinical Depts	Should tie to SoM Dean's Santa Fe Tax Summary
53		0351 0381	Cancer Center Shared Distributions (USE ACCT 0381)	Should tie to CC Distribution Schedule
54		0360	SRMC Revenue	Should equal sum of projected dept-incurred SRMC expenses of only "pre-approved" SRMC positions, with raises on these positions built into the amount. Check validity of dept's budgeted amount by comparing 0360 amounts year over year.
55				
56				
57				
58				
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		0720	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 net to Approved Use of CF (Target Net Margin) given by SOM
69				
70		2110-21J0	Fringe total	Compare to YTD and Prior Year to determine if reasonable

**Cross Check List Before Submitting Your Budget**

# WHEN YOU ARE DONE...

When your budget is complete and ready to be locked (on or before your deadline):

- Send an email to Yvette Hall [yhall@salud.unm.edu](mailto:yhall@salud.unm.edu) and cc Laura Jaramillo [LaJaramillo@salud.unm.edu](mailto:LaJaramillo@salud.unm.edu)
- Attach all of your final reports and let us know your budget is complete and you are ready to lock.
- Return your Allocations & Transfers spreadsheet to Theresa Kelley [TKelly@salud.unm.edu](mailto:TKelly@salud.unm.edu)

# POSITION MANAGEMENT

- Staff Positions

- HR Transaction Center    277-4777    **POSCNTRL@unm.edu**

- Faculty Positions

- Office of Faculty Affairs & Services  
(Main and Branch Campuses)    277-4528    **faculty@unm.edu**

- HSC Faculty Contracts

- Student Positions

- Student Employment    277-3511    **stuemp@unm.edu**

# RESOURCES

## **UNM Budget Office**

Website: <http://budgetoffice.unm.edu/budget/index.html>

FY21/22 Budget Development Calendar

FY22 Budget Guidelines

Standard Operating Procedures (SOPs)

## **Learning Central**

Website: [learningcentral.health.unm.edu/plateau/user/login.jsp](http://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**

following website: [https://lobowebapp.unm.edu/apex\\_ods/f?p=145:1](https://lobowebapp.unm.edu/apex_ods/f?p=145:1)

To locate the name of your HR Consultant, visit the



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## **HSC FACULTY CONTRACTS OFFICE**

**KRICKETT MARQUEZ**

**[KRMARQUEZ@SALUD.UNM.EDU](mailto:KRMARQUEZ@SALUD.UNM.EDU)**

# 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**

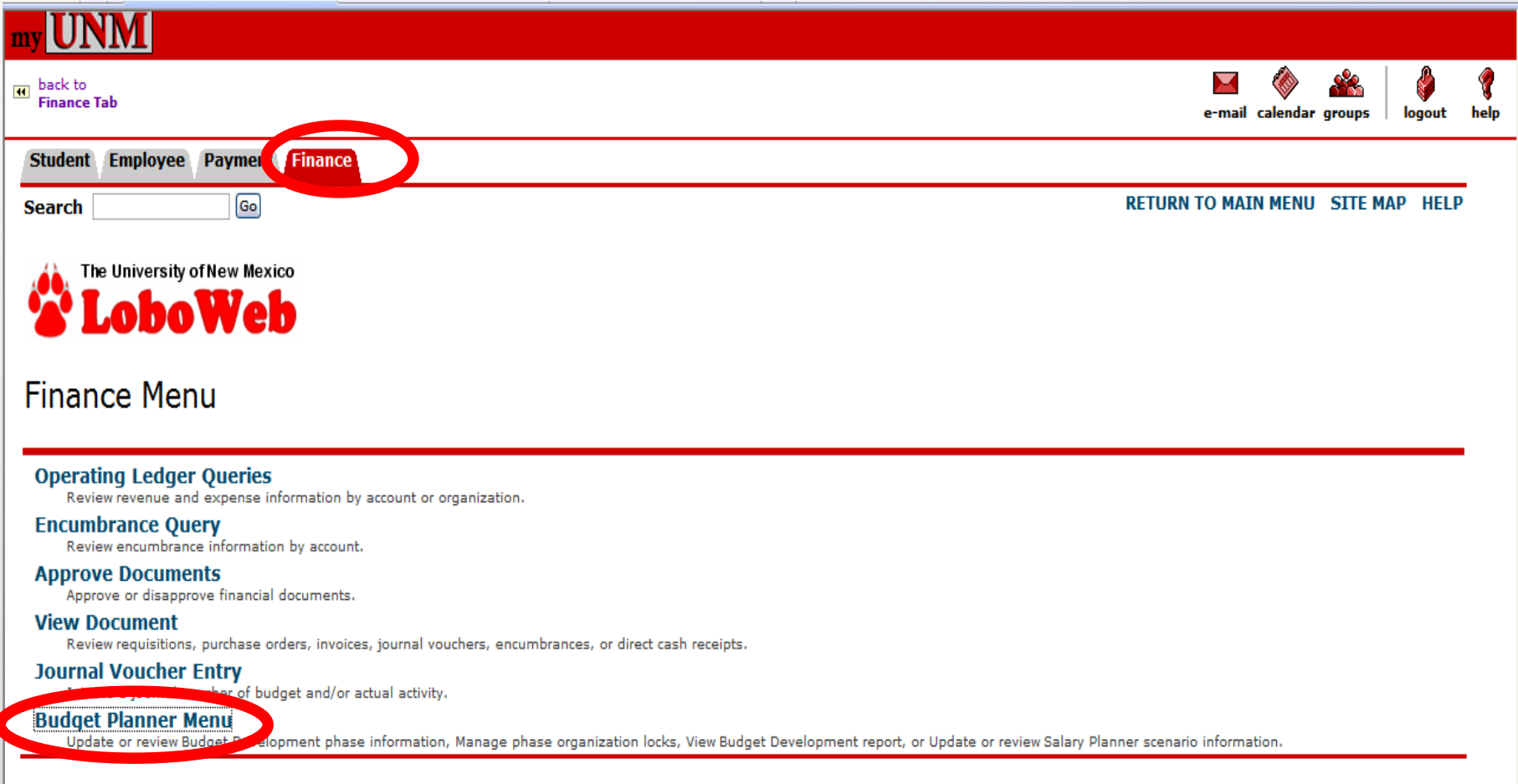
**Department Salary Planner**

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



The screenshot shows the 'myUNM' website interface. At the top, there is a red header bar with the 'myUNM' logo on the left. Below the logo, there is a navigation bar with tabs for 'Student', 'Employee', 'Payroll', and 'Finance'. The 'Finance' tab is highlighted with a red circle. To the right of the tabs, there is a search bar with a 'Go' button. Further right, there are links for 'e-mail', 'calendar', 'groups', 'logout', and 'help'. Below the navigation bar, there is a section titled 'The University of New Mexico LoboWeb'. Underneath this, there is a 'Finance Menu' section. This section contains several links: 'Operating Ledger Queries', 'Encumbrance Query', 'Approve Documents', 'View Document', 'Journal Voucher Entry', and 'Budget Planner Menu'. The 'Budget Planner Menu' link is highlighted with a red circle. Below this link, there is a description: 'Update or review Budget Development phase information, Manage phase organization locks, View Budget Development report, or Update or review Salary Planner scenario information.'

myUNM

back to Finance Tab

e-mail calendar groups logout help

Student Employee Payroll **Finance**

Search  Go

RETURN TO MAIN MENU SITE MAP HELP

The University of New Mexico  
**LoboWeb**

Finance Menu

**Operating Ledger Queries**  
Review revenue and expense information by account or organization.

**Encumbrance Query**  
Review encumbrance information by account.

**Approve Documents**  
Approve or disapprove financial documents.

**View Document**  
Review requisitions, purchase orders, invoices, journal vouchers, encumbrances, or direct cash receipts.

**Journal Voucher Entry**  
Review requisitions, purchase orders, invoices, journal vouchers, encumbrances, or direct cash receipts.

**Budget Planner Menu**  
Update or review Budget Development phase information, Manage phase organization locks, View Budget Development report, or Update or review Salary Planner scenario information.

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

# BUDGET DEVELOPMENT CREATE BUDGET WORKSHEET

my **UNM**

[back to Finance Tab](#)

[e-mail](#) [calendar](#) [groups](#) [logout](#) [help](#)

[Student](#) [Employee](#) [Payment](#) **[Finance](#)**

Search  [Go](#)

[RETURN TO FINANCE MENU](#) [SITE MAP](#) [HELP](#)

The University of New Mexico  
**LoboWeb**

## 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**  
View Budget Development reports.
- Projected Actuals Reports Menu**  
View Projected Actuals reports.

- FROM THE BUDGET PLANNER MENU CLICK ON “CREATE BUDGET WORKSHEET”.



# BUDGET DEVELOPMENT


## CREATE QUERY

Student Employee Payment **Finance**

Search

[RETURN](#)

### Create Budget Worksheet

 To create a new worksheet, select Create Query. To open a worksheet using an existing template, choose a saved query and select

Create a New Worksheet Query

Retrieve Existing Worksheet Query

Saved Query

None




- CLICK ON “CREATE QUERY”.

# BUDGET DEVELOPMENT

Student Employee Payment **Finance**

Search

## Create Budget Worksheet

 Select columns to display amounts captured at the time the budget was built from the Operating or Position

<input type="checkbox"/>	Adopted Budget
<input type="checkbox"/>	Permanent Budget Adjustments
<input type="checkbox"/>	Temporary Adopted
<input type="checkbox"/>	Temporary Adjustments

- 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 Financial Manager (or None), and account types to include in the worksheet.

Chart of Accounts	U	Budget Phase	ADOPTD	Budget
Budget ID	BUD22	Program	P131	
Account Index	702000	Activity	GNACTV	
Fund	3U0044	Location		
Organization	702A			
Display Fin Mgr from:	None			

Check to Include:	
<input checked="" type="checkbox"/>	Revenue Accounts
<input checked="" type="checkbox"/>	Labor Accounts
<input checked="" type="checkbox"/>	Expenses
<input checked="" type="checkbox"/>	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

File Edit View Favorites Tools Help

Suggested Sites Cisco AnyConnect Citrix Access Gateway Help - IT Self Service Help Desk HSLIC MyUNM UNMH Intranet



Back to  
Employee Life Tab

LoboMail UNM Learn Calendar Groups Logout

## Worksheet

Status	Text	Index	Program	Account Type/Code	Title	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
			101		Instruction Unrestricted								
			5T		Intra University Activities								
OPAL	N			1610	Allocations SOM Gen	( 1,548,644.00)	P	( 1,548,644.00)		<input type="checkbox"/>	0.00	( 1,548,644.00)	<input type="checkbox"/>
OPAL	N			1640	Allocations Pooled Allocation Gen	1,616,275.00	P	1,616,275.00		<input type="checkbox"/>	0.00	1,616,275.00	<input type="checkbox"/>
OPAL	N			1660	Allocations Other Gen	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
OPAL	N			1901	Budgeted Use of Reserves	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
			63		Operating Expense Labor Contingency								
OPAL	N			20SA	Salary Adjustments	67,631.00	P	67,631.00		<input type="checkbox"/>	0.00	67,631.00	<input type="checkbox"/>
			71		Operating Expense Other								
OPAL	N			3100	Office Supplies General	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
OPAL	N			80K0	Banner Tax	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>

New rows may be added within the parameters used to create the worksheet.  
Select Calculate to update the worksheet with additions, subtractions, percentage adjustments, deletions.  
Select Post to recalculate and save changes.  
Select Return to return to values last posted.

New Row	Account	Proposed Budget
1	Account1 69Y0	1000
2	Account2	
3	Account3	

- 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

LoboMail UNM Learn Calendar Groups | Logout

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
		<a href="#">043000</a>	P101		Instruction Unrestricted								
				5T	Intra University Activities								
OPAL	N			<a href="#">1610</a>	Allocations SOM Gen	( 1,548,644.00)	P	( 1,548,644.00)	<input type="text"/>	<input type="checkbox"/>	0.00	( 1,548,644.00)	<input type="checkbox"/>
OPAL	N			<a href="#">1640</a>	Allocations Pooled Allocation Gen	1,616,275.00	P	1,616,275.00	<input type="text"/>	<input type="checkbox"/>	0.00	1,616,275.00	<input type="checkbox"/>
OPAL	N			<a href="#">1660</a>	Allocations Other Gen	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
OPAL	N			<a href="#">1901</a>	Budgeted Use of Reserves	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
				63	Operating Expense Labor Contingency								
OPAL	N			<a href="#">20SA</a>	Salary Adjustments	67,631.00	P	67,631.00	<input type="text"/>	<input type="checkbox"/>	0.00	67,631.00	<input type="checkbox"/>
				71	Operating Expense Other								
OPAL	N			<a href="#">2100</a>	Office Supplies General	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
NEW	N			<a href="#">69Y0</a>	Professional Svcs F&A	0.00	P	<a href="#">1,000.00</a>	<input type="text"/>	<input type="checkbox"/>	1,000.00	1,000.00	<input type="checkbox"/>
					Unrestricted								
OPAL	N			<a href="#">80K0</a>	Banner Tax	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>

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

Account2		
Account3		
Account4		
Account5		

Requery	Calculate	Post
---------	-----------	------

Download All Worksheet Columns	Download Selected Worksheet Columns
--------------------------------	-------------------------------------

### Summary Totals

Account Type	Account Type Title	Base Budget	Proposed Budget	New Budget	Cumulative Change
5T	Intra University Activities	67,631.00	68,631.00	68,631.00	1,000.00
50	Revenues and Intra Univ Activities	67,631.00	68,631.00	68,631.00	1,000.00
63	Operating Expense Labor Contingency	67,631.00	67,631.00	67,631.00	0.00
60	Operating Expenses-Labor	67,631.00	67,631.00	67,631.00	0.00
71	Operating Expense Other	0.00	1,000.00	1,000.00	1,000.00
70	Other Expense	0.00	1,000.00	1,000.00	1,000.00
Net		0.00	0.00	0.00	0.00

[Return To Top](#)

[Return to Index Page](#)

[https://appintg.unm.edu/pls/intg/bwfkbwsh.P\\_Budget\\_Worksheet](https://appintg.unm.edu/pls/intg/bwfkbwsh.P_Budget_Worksheet)

- 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. If you are budgeting between indices, you must have sufficient carryforward in the index being budgeted.**


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												
<a href="#">0380</a>	UNMMG Clinical Sales & Services	0.00	0.00	0.00	0.00	0.00	P	<a href="#">0.00</a>		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
5T	Intra University Activities												
<a href="#">1901</a>	Budgeted Use of Reserves	8,080.00	0.00	0.00	0.00	8,080.00	P	<a href="#">10,000.00</a>		<input type="checkbox"/>	1,920.00	10,000.00	<input type="checkbox"/>
71	Operating Expense Other												
<a href="#">50E0</a>	Lab Medical Supplies Gen	0.00	0.00	0.00	0.00	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
<a href="#">69Z0</a>	Other Professional Services Gen	8,000.00	0.00	0.00	0.00	8,000.00	P	<a href="#">10,000.00</a>		<input type="checkbox"/>	2,000.00	10,000.00	<input type="checkbox"/>
<a href="#">8045</a>	Interdepartmental Support	0.00	0.00	0.00	0.00	0.00	P	0.00		<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
<a href="#">80K0</a>	Banner Tax	80.00	0.00	0.00	0.00	80.00	P	<a href="#">0.00</a>		<input type="checkbox"/>	( 80.00)	0.00	<input type="checkbox"/>

Index Must net to \$0

# BUDGET DEVELOPMENT REPORTS

[Student](#) [Employee](#) [Payment](#) [Finance](#)

Search

 The University of New Mexico  
**LoboWeb**

## 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 and unlock Budget Development phase organization locks.
- Budget Development Reports Menu**  
View Budget Development reports.
- Projected Actuals Reports Menu**  
View Projected Actuals reports.

- **CLICK ON THE “BUDGET DEVELOPMENT REPORTS MENU”**

# BUDGET DEVELOPMENT REPORTS (CONT.)

[Student](#) [Employee](#) [Payment](#) [Finance](#)

Search



## 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.

Use throughout process to see results at detailed or summary level by org 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.

Confirm indices 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.

Confirm allocations by Fund net to zero

### Budgeted Transfers/Allocations Report

Reports budgeted summary by account for transfer and allocation accounts only

Confirm comments added for all transfers

### 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

Run at beginning for list of all indices, and run again after budget process to ensure nothing was missed

### Budgeted Indices Not Modified Report

Reports budgeted Index codes that have not been modified

[\[ Operating Ledger Queries | Encumbrance Query | Approve Documents | View Documents \]](#)

# 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

### Budget Development Working Report - Budget Year

- 1 - Revenue and Expense Summary by Organization
- 2 - Revenue and Expense Breakdown by Organization
- 3 - Line Item Detail by Organization
- 4 - Index Detail Without Position Detail
- 5 - Index Detail With Position Detail**
- 6 - Index Summary

Chart of Accounts  Detail Level

Budget ID	<input type="text" value="BUD22"/>	Budget Phase	<input type="text" value="ADOPTD"/>	<input type="button" value="Budget"/>
Account Index	<input type="text" value="238954"/>			
Organization	<input type="text"/>			
Fund Type Level 2	<input type="text"/>			
Fund	<input type="text"/>			
Program	<input type="text"/>			

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



UNIVERSITY OF NEW MEXICO  
BUDGET WORKING REPORT for FY 2021-2022

Executive Level: AF VP Health Sciences Center

Organization: 523A SOM Surgery

Fund Type Level 2:

Fund:		Appt		Hiring		FY 2019-2020		Budgeted	
Program:		Percent		Orgn		Budget		FTE	
<hr/>									
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



### 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

---

# OPERATING BUDGET SUMMARY

**NO APPROVED USE OF  
RESERVE**



UNIVERSITY OF NEW MEXICO  
OPERATING BUDGET SUMMARY for FY 2021-2022  
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
<b>Total REVENUES</b>	<b>\$309,359</b>

## EXPENSES

### Compensation Costs

Faculty Salary Detail	\$115,113
Other Salaries	\$110,487
Payroll Benefits	\$21,318
<b>Total Compensation Costs</b>	<b>\$246,918</b>

### 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
<b>Total Non-Salary Expenses</b>	<b>\$62,441</b>

<b>Total EXPENSES</b>	<b>\$309,359</b>
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<b>NET MARGIN</b>	<b>\$0</b>
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<b>Budgeted Use of Reserves</b>	<b>\$0</b>
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<b>NET RESERVES</b>	<b>\$0</b>
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# OPERATING BUDGET SUMMARY

## WITH APPROVED USE OF RESERVE



UNM

UNIVERSITY OF NEW MEXICO  
OPERATING BUDGET SUMMARY for 2021-2022  
Organization: 794A Obstetrics Gyn  
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
<b>Total REVENUES</b>	<b>\$10,246,790</b>

### 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
<b>Total Compensation Costs</b>	<b>\$9,459,680</b>

#### 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
<b>Total Non-Salary Expenses</b>	<b>\$924,110</b>

**Total EXPENSES** \$10,383,790

**NET MARGIN** (\$137,000)

**Budgeted Use of Reserves** \$137,000

**NET RESERVES** \$0

**THANK YOU!**

