

FY₂₃ BUDGET BUILD KICKOFF BUDGET PLANNER OVERVIEW

MARCH 14, 2022



Overview Objectives

Timeline

- Critical events and dates

Process & System Overview

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

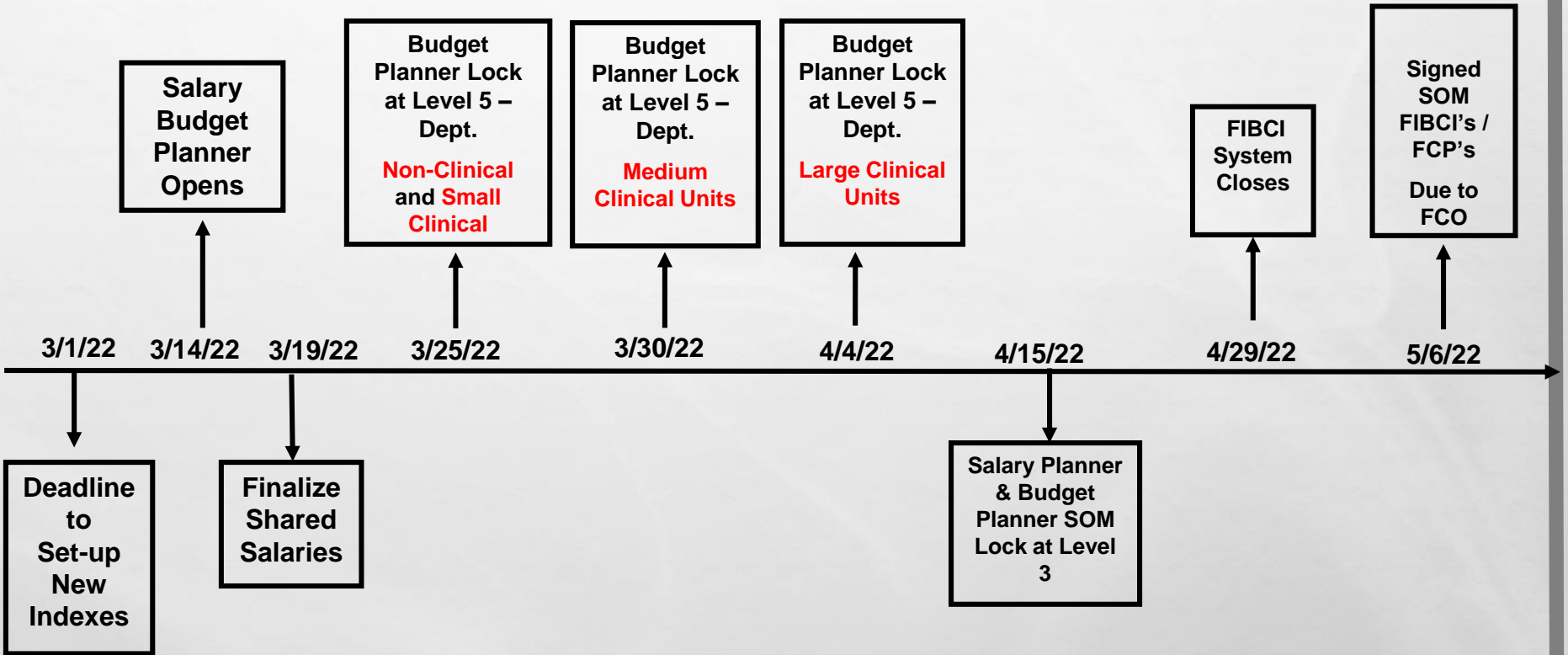
Resources

- Contacts and Online Resources

New Users

- Budget Planner Overview / Refresher

TIMELINE FOR FY23 BUDGET BUILD



SOM LOCK DATES

MARCH 25TH

NON-CLINICAL AND SMALL CLINICAL:

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

MARCH 30TH

MEDIUM CLINICAL:

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

APRIL 4TH

LARGE CLINICAL:

CANCER CENTER
INTERNAL MEDICINE
PEDIATRICS
PSYCHIATRY
SURGERY

HSC NON-SOM UNITS LOCK DATES

- **HSC Administration / PPD / UNMMG April 11th**
- **HSC CON/COP/HSLIC April 13th**

LAB WORKING SESSIONS

Zoom Sessions

(Drop in anytime during these days/times)

- Monday, March 21st 10:00 am - Noon
- Tuesday, March 22nd 10:00 am - Noon
- Thursday, March 24th 2:00 pm - 4:00 pm

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

Faculty Contracts Office (FCO)

SOM FIBCI (FY23 opened for entry March 1st - closes on April 29th)

- Signed FIBCI's due to HSC FCO **May 6, 2022 at 5:00 PM**

COP FIBCI (FY23 opened for entry March 1st - closes on May 6th)

- Signed FIBCI's due to HSC FCO **May 13, 2022 at 5:00 PM**

CON FCP (FY23 opened for entry March 1st - closes on May 6th)

- Signed FCP's due to HSC FCO **May 13, 2022 at 5:00 PM**

Remember! Salary reflected in Salary Planner must equal contract salary (Base plus Supplement) as reflected on the FY23 FIBCI/FCP.

Shared Salaries



- Must be finalized between departments by March 19, 2022

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*
<input type="button" value="▶"/>		

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	
<input checked="" type="radio"/> Excel 2007	<input type="radio"/> HTML
<input type="radio"/> PDF	<input type="radio"/> HTML Active Report
<input type="button" value="▶"/> <input type="button" value="⌛"/> <input type="button" value="↶"/>	

FSRSLSH-HSC Salary Planner Shared Salary

Index Organization Level 5 : '997A' Fiscal Year

Share Department Changes for Future Fiscal Year Budget

Home Department Changes Confirmation/Change

Name	Org	Acct	Employee	Position	Suffi	Fun Type	Shared	Index	%	Annual Salary	Budget Amount	Revised	Revised	Revised	Revised	Revised	Revised
												Labur	Job	Total	Labur	Job	Total
												Distributi	Annual	Budgete	Distributi	Annual	Budgete
												on	Salary	d	on	Salary	d
												%	Prepared	to Index	%	Prepared	to Index
												Note		Note		Note	
Index Organization Level 5 : 997A-Pediatrics																	
College of Nursing	AFD	2000	UNM Employee	FY1063	00	CRHSC	9972AJ	10.00	100,000.00	10,000							
College of Nursing	AFD	2000	UNM Employee	FY0469	00	CRHSC	9972AC	12.04	141,800.00	18,491							
College of Nursing	AFD	2000	UNM Employee	FY0599	00	CRHSC	9972AJ	10.00	100,000.00	10,000							
College of Nursing	AFD	2000	UNM Employee	FY0723	00	CRHSC	9972AJ	15.00	118,800.00	17,820							
Anthropology Department	045A	2000	UNM Employee	FV2369	00	CRHSC	9972DS	43.34	52,500.00	22,754							
COP Pharmacy Practice & Admin Scien	511A	2000	UNM Employee	FY0802	00	CRHSC	9972AC	22.53	111,491.47	25,119							
COP Pharmacy Practice & Admin Scien	511A	2000	UNM Employee	FY0802	00	CUHSC	997197	22.52	111,491.47	25,103							
COP Pharmacy Practice & Admin Scien	511A	2007	UNM Employee	FTW073	00	CRHSC	497459	32.00	35,079.87	11,226							
COPH Deans Office	304A	2000	UNM Employee	FE0137	00	CRHSC	9972F4	3.00	260,000.00	7,800							
ORTC Population Sci Academic Unit	0992I	2020	UNM Employee	S09546	00	CRHSC	9972F4	20.00	60,919.38	12,184							
Medical Oncology	0995I	2000	UNM Employee	FY1424	00	CUHSC	9972ET	24.73	228,866.00	56,599							
Dispute Resolution	398A	2020	UNM Employee	S09739	00	CRHSC	99720J	8.34	45,000.00	3,753							
Dispute Resolution	398A	2020	UNM Employee	S09739	00	CRHSC	99720K	8.33	45,000.00	3,749							
Family Community Medicine FCM	160B	2000	UNM Employee	FV2189	00	CRHSC	9972F4	5.00	96,000.00	4,800							
Family Community Medicine FCM	160B	2000	UNM Employee	FY1512	00	CRHSC	497459	100.00	33,861.52	33,862							
Family Community Medicine FCM	160B	2000	UNM Employee	FV2331	00	CRHSC	9972F4	15.00	87,450.59	13,118							
Family Community Medicine FCM	160B	2000	UNM Employee	FY0790	00	CRHSC	9971FF	5.00	105,478.74	5,274							
Family Community Medicine FCM	160B	2000	UNM Employee	FY0790	00	CRMain	9971WV	5.00	105,478.74	5,274							
Family Community Medicine FCM	160B	2000	UNM Employee	FY0848	00	CRHSC	9972DR	4.80	195,999.08	9,408							
Family Community Medicine FCM	160B	2000	UNM Employee	FY0848	00	CRHSC	9972DS	4.80	195,999.08	9,408							
HS Library and Informatic Ctr	483A	2040	UNM Employee	S01644	00	CUHSC	997590	100.00	46,115.16	46,115							
IM Div of Epidemiology	85IH	2000	UNM Employee	FY1060	00	CRHSC	9972F4	20.00	100,000.00	20,000							
Neurology Child	490C	2000	UNM Employee	FY0596	00	CRHSC	99720K	10.00	222,634.76	22,263							
Neurology Child	490C	2000	UNM Employee	FY0411	00	CRHSC	99720J	1.00	176,942.06	1,769							
Neurology Child	490C	2000	UNM Employee	FY0411	00	CRHSC	99720K	69.00	176,942.06	122,090							
Neurology Child	490C	2000	UNM Employee	FY0411	00	CRHSC	99720M	1.00	176,942.06	1,769							
OB GYN Maternal Fetal Medicine	794D	2020	UNM Employee	S08909	00	CRHSC	99720P	10.00	72,000.00	7,200							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FY0382	00	CUHSC	9971I7	25.00	207,153.00	51,788							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FY1128	00	CRHSC	99720K	15.00	97,100.00	14,565							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FY0821	00	CUHSC	9971I7	12.50	196,097.00	24,512							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FY0821	00	CUHSC	997994	12.50	196,097.00	24,512							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FV2667	00	CRHSC	9972GK	10.00	81,000.00	8,100							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FY0447	00	CUHSC	99706Y	50.00	81,000.00	40,500							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FY0447	U1	CUHSC	99706Y	50.00	.00	0							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FV2541	00	CRHSC	9972D2	50.00	20,500.00	10,250							
Pzyc Child Adolozcent Div C A	451C	2000	UNM Employee	FV2543	00	CRHSC	9972DM	100.00	20,500.00	20,500							
Pzyc Community Behavioral Health	451E	2000	UNM Employee	FY0040	00	CRHSC	9972GK	1.00	101,000.00	1,010							
Pzyc Community Behavioral Health	451E	2007	UNM Employee	FTW010	00	CRHSC	99720K	100.00	8,913.25	8,913							
Pzyc Community Behavioral Health	451E	2020	UNM Employee	S09194	00	CRHSC	9972GK	5.00	51,249.92	2,563							
Pzyc Community Behavioral Health	451E	2060	UNM Employee	S08649	00	CRHSC	9972GK	25.00	19,379.88	4,845							
Pzyc Neuropsychology	451H	2000	UNM Employee	FY0753	00	CUHSC	9971F8	3.28	131,796.00	4,323							
Pzyc Neuropsychology	451H	2000	UNM Employee	FY0669	00	CRHSC	9971W1	30.00	52,400.00	15,720							
Pzyc Neuropsychology	451H	2000	UNM Employee	FY0669	00	CUHSC	9970S3	30.00	52,400.00	15,720							

997A Employee Count: 34

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 Ma

Mid Mar

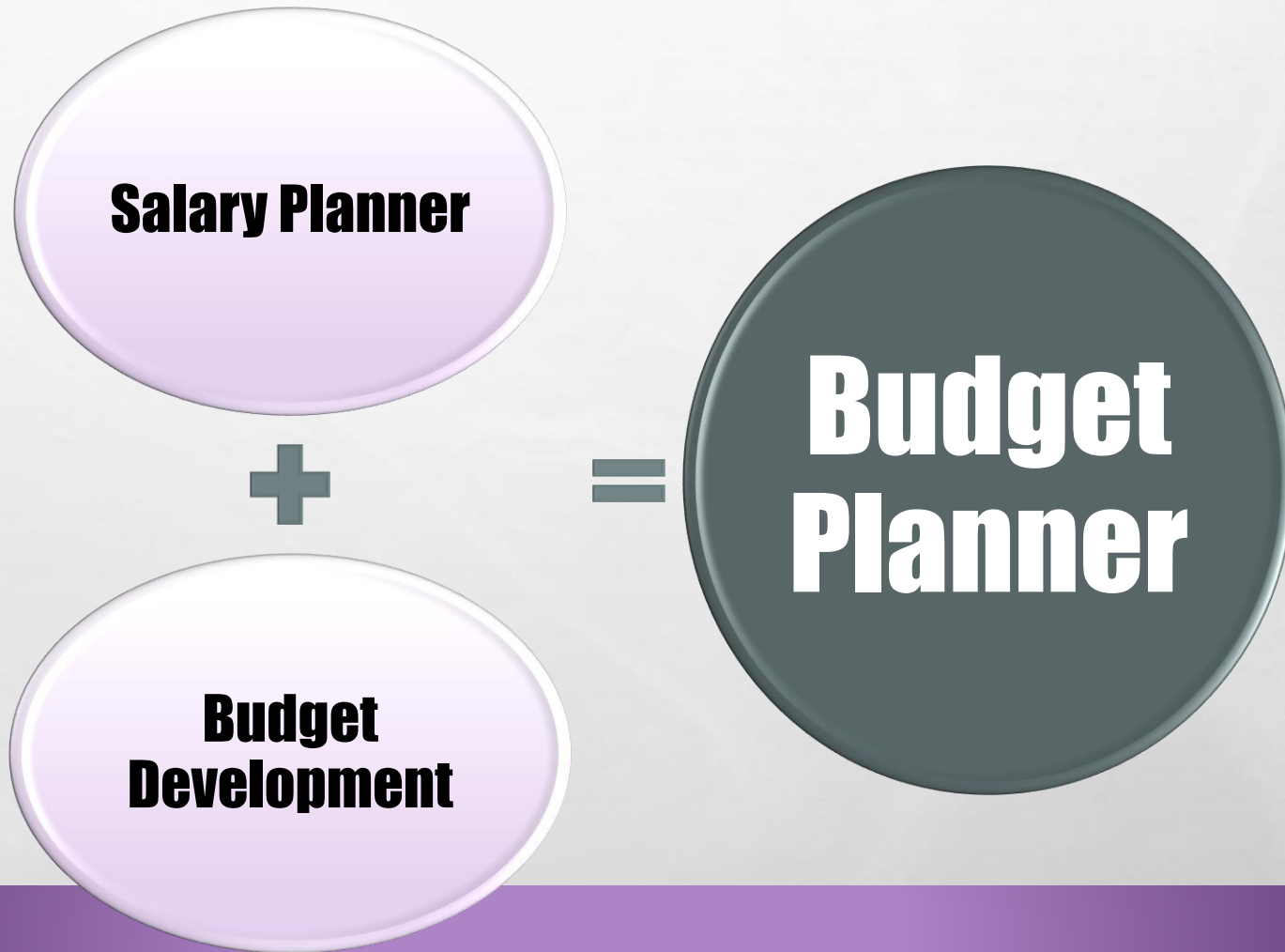
MARCH
19th

Early Jul

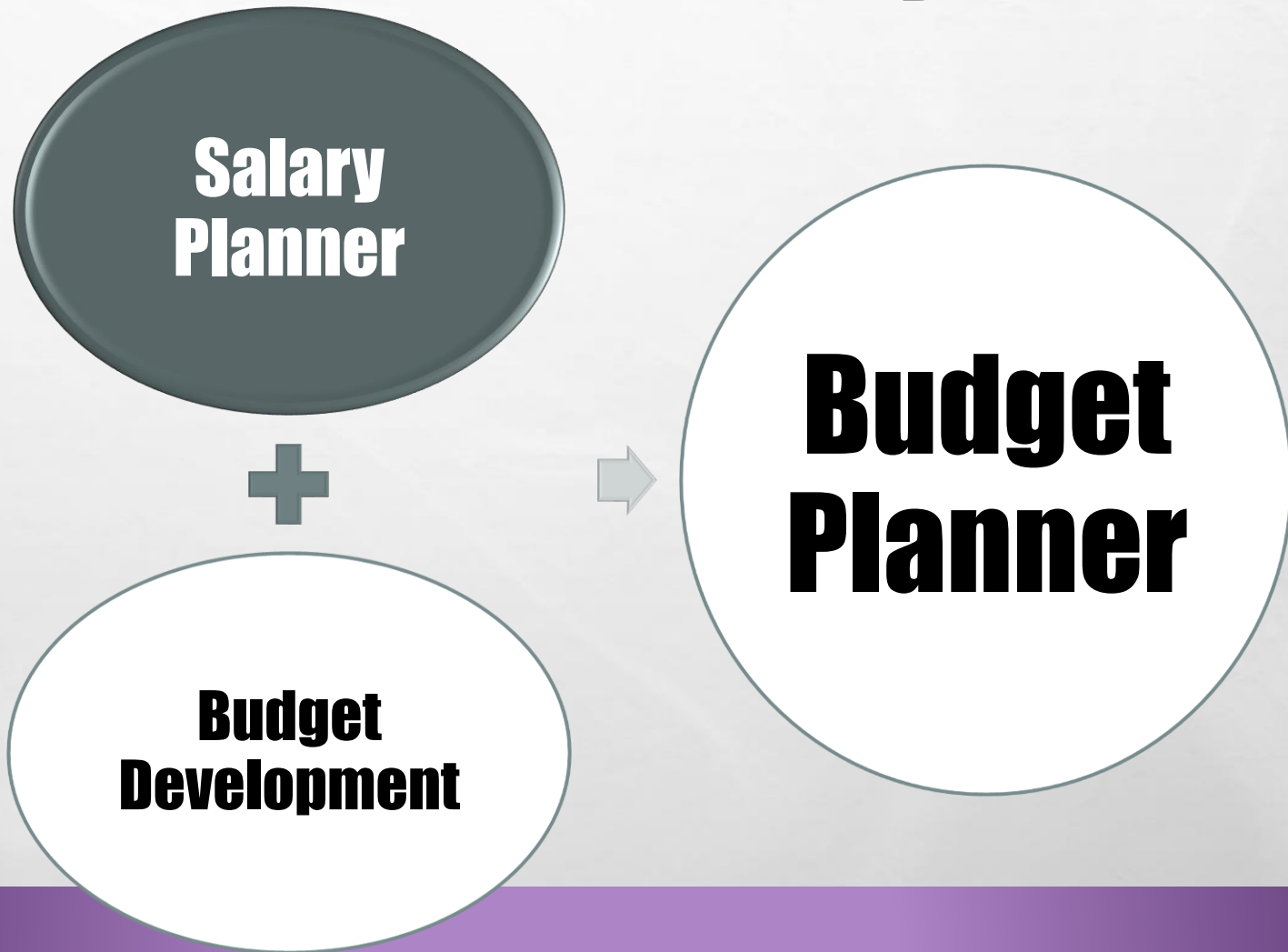
The Budget Planner System



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

Scenario Selection

Extract ID: 12FAC23 ▼

Scenario: 12FAC22 ▼
12FAC23 ▼
9FAC22
9FAC23
CSTAFF22
CSTAFF23
CWA22
CWA23
HSTAFF22
HSTAFF23
POOL22
POOL23
RSTAFF22
RSTAFF23
USUNM22
USUNM23

Filter Criteria:

By Position

By Employee

Select

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

Extract ID:	Scenario:
12FAC23	12_MO_FACULTY_23
9FAC23	9_MO_FACULTY_23
HSTAFF23	HOUSESTAFF_23
RSTAFF23	REG STAFF_23
POOL23	POOLED_POSITIONS_23
CSTAFF23	CONTRACT_STAFF_23

UNION SCENARIOS

CWA23	CWA_BARG_UNIT_23
USUNM23	USUNM_BARG_UNIT_23

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 '23' for this budget cycle!

SALARY PLANNER

JOB VS. POSITION

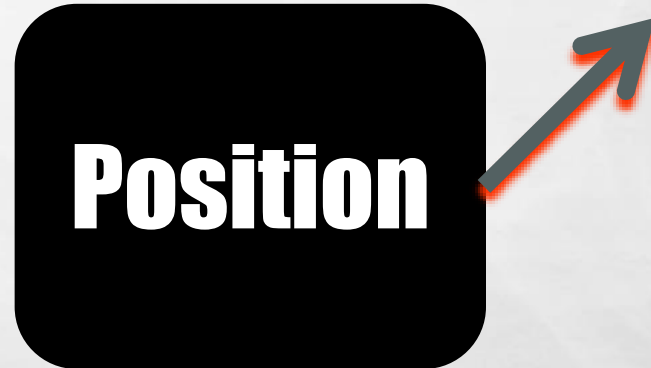
HR

Budget



How employee is
paid on July 1

Created when Employee is hired
– Always tied to an Employee



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 must budget on both sides in order to get to 100% distribution

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

JOB

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 10001183
Position-Suffix and Title: S08718-00 Financial Analyst
EPAF Transaction #:

Budget Distribution for Position S08718 Financial Analyst.

Current

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

Proposed

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

Add New Record

Proposed Position Distribution

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

Current

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

Proposed

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

Add New Record

Current Incumbent

Name and ID: Yvette B Hall 10001183
Position-Suffix and Title: S08718-00 Financial Analyst

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

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			50.00	48,475.40

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	

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 FY23 index**. If not, the nightly refresh process will drop that index.

The last refresh will be the night of **April 18th**.

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

SALARY PLANNER

- WARNING TO USERS

Since possible increases may have taken effect after Salary Planner closed last year, work will need to be done to match 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

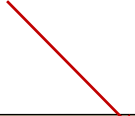
Hourly or Salary:

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

[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
	501977 - 00 Medical Practice Specialist	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

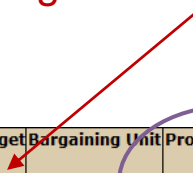
Mass Change

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
Medical Practice Specialist, Sr	100.00	100.00	1	1	55,897.00	.00	.00	55,897.00		53,747.16	Employee Distribution Comments Employee		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
FY0056 Clinician Ed - Professor	100.00	100.00	0	0	.00	.00	.00	.00		.00	Distribution Comments Employee		<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

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

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

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

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)



Back to Employee Life Tab



[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		<input type="checkbox"/>
FY1015 Research Professor	100.00	100.00	.85	.85	102,479.00	0.00	0.00	102479.00		117,971.00	Distribution Comments Employee		<input type="checkbox"/>
FY1101 Research Asst Professor	100.00	100.00	.5	.5	48,900.00	-100.00	-48900.00	0.00		.00	Distribution Comments		<input type="checkbox"/>
FY1607 Research Asst Professor	100.00	100.00	0	0	.00	.00	.00	.00					<input type="checkbox"/>
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	Proposed Budget	Bargaining Unit	Proposed Job Salary
023A - SOE Mechanical Engineering			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.

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	<input type="text"/>	<input type="text"/>	Yes

Mass Apply

[Jump to Bottom](#)

013B Continuing Med Educ Gen Admin, Locked, Updateable

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals						
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Job Salary	Ext 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 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:

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

Mass Apply

[Jump to Bottom](#)

013B Continuing Med Educ Gen Admin, Locked, Updateable

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals							
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Job Salary	Extract Status	Excluded from Totals
	S04847 - 00 Program Manager	100.00	57,607.03	100.00	100.00	56,201.98	<input type="text" value="2.50"/>	<input type="text" value="1,405.05"/>	<input type="text" value="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



Back to Employee Life Tab



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

Need to clear out old position and position budget and setup new budget with current incumbent.

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 Jewell Joseph 101612567

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

Funr:	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	1.00
	-- Vacant Position --	S11516	100 % 296A	59,800	1.00
	Arguelles, Laura	S06852	100 % 296A	59,800	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
20F1	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: BUD23
Budget Phase: ADOPTD

Mass Change

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
Clinician Ed-Assist Prof	100.00	100.00	1	0	169,983.00	-100.00	-169,983.00	.00		.00	Distribution Comments Employee		No

Example of a position that is going away. The Proposed FTE should be changed to 0.

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

UF0570 #Student Entry Level	100.00	100.00	1	1	.00	#####	6,485.00	6,485.00		.00	Distribution Comments* Employee		No
--	--------	--------	---	---	-----	-------	----------	----------	--	-----	---	--	----

POSITION DETAIL SCREEN

Position Detail

Update of Budget Development


Chart of Account: U
Budget ID: BUD23
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

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

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.**

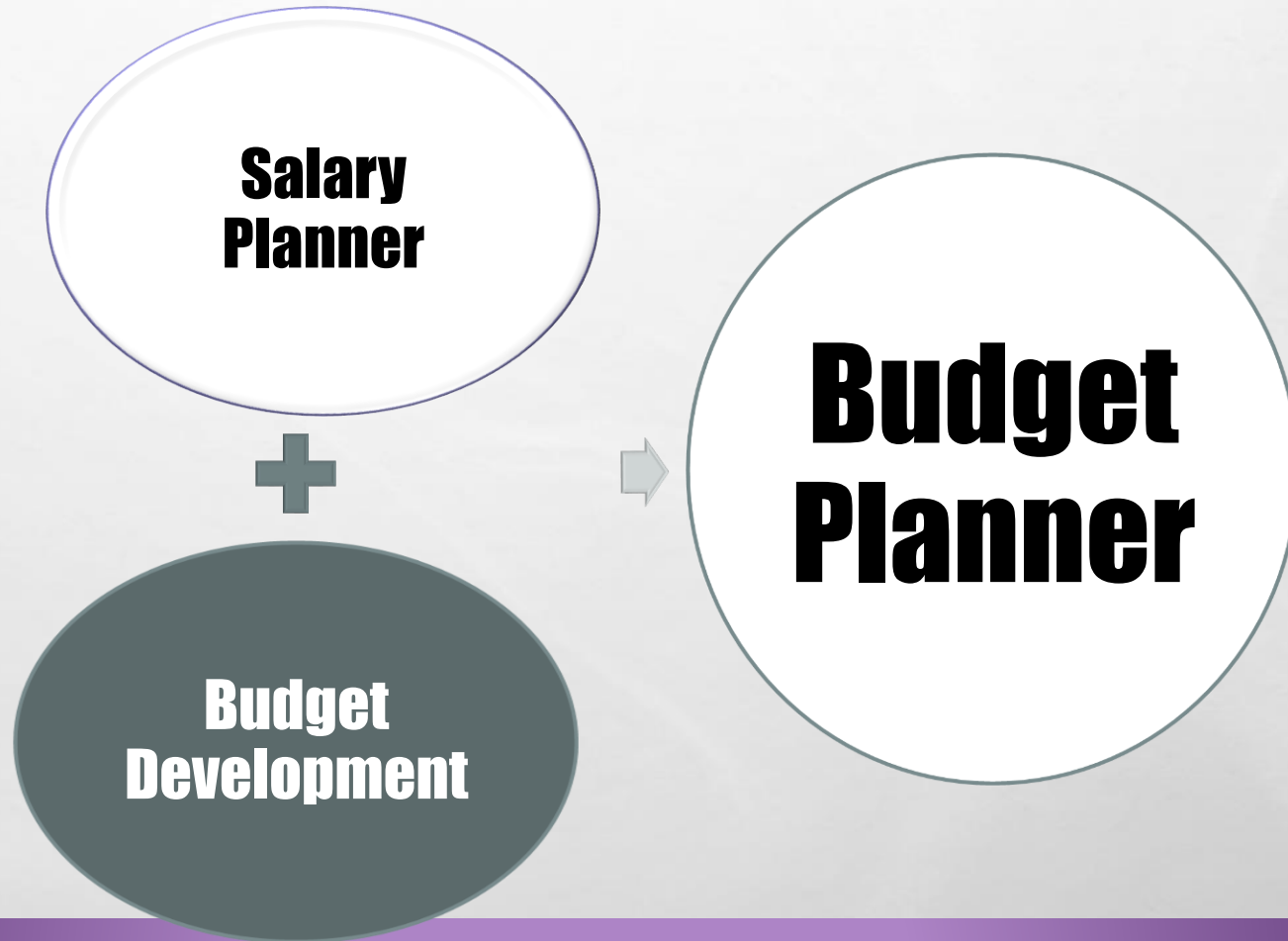


UNIVERSITY OF NEW MEXICO
 SALARY PLANNER WORKING REPORT for FY 2021 - 2022
 Organization: 043A - School of Medicine Deans Office ; Include Vacant Positions: Y
 Index: - ; Fund: -

Account	Employee Name	Position, Suffix, Title	Hiring Org	Performance Rating	Posn Budget	Current Labor Distribution				Proposed Labor Distribution				Change Amt	Change %
						Index	%	Amount	FTE	Index	%	Amount	FTE		
2020	* Vacant Position	S06807 Executive Project Director	099D		0	043482	100.00%	0	0	043482	100.00%	0	0	0.00%	
	* Vacant Position	S06709 HS Associate Scientist 3	099Q			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S06716 Fiscal Services Tech	523K		0	R 043499	100.00%	1	1	R 043499	100.00%	1	0	0.00%	
	* Vacant Position	S06767 Health Educator	160I			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S06853 HS/Associate Scientist 2	099Q			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07318 Dental Assistant	523K			R 043499	100.00%	1	0		0.00%	0	(1)	(100.00%)	
	* Vacant Position	S07332 Health Educator	160I			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	Vacant Position	S07380 Mgr, Som Faculty Emplmnt Svcs	043G		0	268000	100.00%	0	1.00	268000	100.00%	0	1.00	0.00%	
	* Vacant Position	S07412 Clinical Research Mgr	558B			R 043499	0.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07424 HS Research Tech 2	099Q			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07599 Training & Devt Consultant	558E			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07627 Dental Assistant	523K			R 043499	100.00%	1	0		0.00%	0	(1)	(100.00%)	
	* Vacant Position	S07645 Dental Assistant	523K			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07646 Admin Assistant 2	523K		0	R 043499	100.00%	1	1	R 043499	100.00%	1	0	0.00%	
	* Vacant Position	S07651 Database Administrator	651E			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07696 Dental Assistant	523K			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07705 Dental Assistant	523K			R 043499	100.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07925 Clinical Research Mgr	558B			R 043499	0.00%	0	0		0.00%	0	0	0.00%	
	* Vacant Position	S07944 Analyst/Programmer 2	099M			R 043499	100.00%	0	0		0.00%	0	0	0.00%	

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: BUD23
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	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
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
18			Operating Ledger Summary prior month and prior Year end 6/30/XX
19			
20	EPRINT		
21	Generate and Save:		
22			Index Hierarchy Report
23	Budget Planner		
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 Yvette Hall 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 FY23 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 29,2021.

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	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
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
18			Operating Ledger Summary prior month and prior Year end 6/30/XX
19			
20	EPRINT		
21	Generate and Save:		
22			Index Hierarchy Report
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24	Generate and Save:		
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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			
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 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.
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	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 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 Ashley Gilbert amgilbert@salud.unm.edu **and** cc Laura Jaramillo LaJaramillo@salud.unm.edu
- Attach all of your **Org Level 5 FINAL reports** (refer to slide 50) and let us know your budget is complete and you are ready to lock.
- Please make sure your final reports are not filtered on any other FOAPAL element such as fund, program, etc. which will limit report data.
- Return your Allocations & Transfers spreadsheet to Yvette Hall Yhall@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 272-4231 HSC-HSCFCO@salud.unm.edu

- Student Positions

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

RESOURCES

UNM Budget Office

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

FY22/23 Budget Development Calendar

FY23 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

following website: https://lobowebapp.unm.edu/apex_ods/f?p=145:1

To locate the name of your HR Consultant, visit the

CONTACTS

SOM FINANCE

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HSC FACULTY CONTRACTS OFFICE

KRICKETT MARQUEZ

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

my **UNM**

back to Finance Tab

e-mail calendar groups logout help

Student Employee Payment **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](#)**

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

The University of New Mexico
 **LoboWeb**

Budget Planner Menu

- Create Budget Development Query**
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Update Budget Development phase information via a budget worksheet.
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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 Retrieve Query.

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	<input type="text" value="U"/>	
Budget ID	<input type="text" value="BUD23"/>	Budget Phase <input type="text" value="ADOPTD"/> Budget
Account Index	<input type="text" value="9972RZ"/>	Program <input type="text" value="P131"/>
Fund	<input type="text" value="3U0034"/>	Activity <input type="text" value="GNACTV"/>
Organization	<input type="text" value="997J0"/>	Location <input type="text"/>
Display Fin Mgr from:	<input type="text" value="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

Save Query as:

Shared

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

- 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

Page Safety Tools



Back to Employee Life Tab

LoboMail UNM Learn Calendar Groups Logout

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
			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 Revert 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

Change Value: Percent



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)	<input type="text"/>	<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="text"/>	<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="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
OPAL	N			1901	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			20SA	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			2100	Office Supplies General	0.00	P	0.00	<input type="text"/>	<input type="checkbox"/>	0.00	0.00	<input type="checkbox"/>
NEW	N			69Y0	Professional Svcs F&A	0.00	P	1,000.00	<input type="text"/>	<input type="checkbox"/>	1,000.00	1,000.00	<input type="checkbox"/>
OPAL	N			80K0	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

2	Account2		
3	Account3		
4	Account4		
5	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

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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												
0380	UNMMG Clinical Sales & Services	0.00	0.00	0.00	0.00	0.00	P	0.00			0.00	0.00	<input type="checkbox"/>
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	<input type="checkbox"/>
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	<input type="checkbox"/>
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	<input type="checkbox"/>
8045	Interdepartmental Support	0.00	0.00	0.00	0.00	0.00	P	0.00			0.00	0.00	<input type="checkbox"/>
80K0	Banner Tax	80.00	0.00	0.00	0.00	80.00	P	0.00			(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

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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 **Budget Phase**

Account Index

Organization

Fund Type Level 2

Fund

Program

- 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:	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



Budget Development Reports Menu

Budget Development Working Report - Budget Year

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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: 043A School of Medicine Deans Office
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 FY 2021 - 2022
Organization: 043A School of Medicine Deans Office
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!

