

# **BUDGET PLANNER/SALARY PLANNER FREQUENTLY ASKED QUESTIONS (FAQs)**

## **Salary Planner**

**Q. *Why do I not see the proposed salary information in Budget Development that I entered into Salary Planner?***

**A.** You must update the position budget and position labor distribution in Salary Planner.

**Q. *If I don't see an employee listed in my Org code, what do I do?***

**A.** They may have a different Position Org code. Complete an Org Change Form (<http://hr.unm.edu/forms/employment.php>) and submit the form to HRPR@unm.edu.

**Q. *How do I change the salary budget?***

**A.** Salary budgets are updated in Salary Planner in the following screens:

- List by Position screen
- Position Detail screen

**Q. *If I have an employee who should not be in the Hiring Org they are listed in, what do I do?***

**A.** Complete an Org Change Form (<http://hr.unm.edu/forms/employment.php>) and submit the form to HRPR@unm.edu.

**Q. *If I have a position that should not be in the Org it is listed in, what do I do?***

**A.** Complete an Org Change Form (<http://hr.unm.edu/forms/employment.php>) and submit the form to HRPR@unm.edu.

**Q. *Do I have to enter text comments on salary information?***

**A.** Yes, for each of the following scenarios:

### **Faculty:**

- Indicate the 9- or 12-month base salary for all faculty not at 1.00 FTE
- Complete a comment for all faculty not at 1.00 FTE
- Complete a comment for all faculty with joint appointments or split labor distributions
- Indicate Sabbaticals at .67 FTE, .835 FTE or 1.00 FTE. Complete a comment for all Sabbaticals and LWOP. Indicate the 9- or 12-month base.
- For retirements, if retirement date is known, indicate in comments
- For new faculty, indicate whom they are replacing in the comments
- **DO NOT INCLUDE** personal information about the faculty member in the comments, such as "due to medical leave" or "due to divorce," etc.

**Staff:**

- Appointment Percent changes, whether increase or decrease
- Career Ladders
- Any individual on Leave Without Pay
- Terms ending and not being extended
- Salary increase (must have exception memo with EVP approval)
- Employees being placed on the layoff list
- **DO NOT INCLUDE** personal information about the staff member in the comments, such as “due to medical leave” or “due to divorce,” etc.

**Q. *If I'm entering fringe benefit information, where can I obtain the correct fringe amount to enter?***

**\*A.** See Budget Guidelines posted under the Budget Planner tab on OPBA's website (<http://www.unm.edu/~budget/guidelines/>).

**Q. *Do the salary and salary budgets have to match?***

**A.** No. There may be a situation where you plan to increase/decrease the job during the year, and in that case they will not match.

**Q. *The salary and salary budget don't match for an employee and they should match. What do I do?***

**A.** You must update the position budget and position labor distribution in Salary Planner.

**Q. *Is it okay that the entire position budget shows in my Org in Salary Planner for someone who is 60/40 split?***

**A.** The entire position budget will show in Salary Planner Working Report even if their salary distribution is split. However, in the Budget Development Working Report, you will only see the amount paid by your index.

**Q. *Why doesn't an employee in another Org who is partly paid from my Org show up on my Salary Planner?***

**A.** Because Salary Planner security is set up by the position Org code. If the position is not owned by your Org, then you will not see it.

**Q. *Why won't an employee who is in the correct Org code show up in Salary Planner?***

**A.** If the job record has a definite end date of 6/30 or sooner, the job will not appear in Salary Planner because Salary Planner data is effective 7/1.

**Q. *Can two employees be in the same position during Salary Planner time?***

**A.** No. It causes the position budget to be duplicated on the Budget Development Working Report.

**Q. *Should departments budget salaries or portions of salaries that are paid on grants?***

A. Departments do not budget restricted indices in Budget Development, but in Salary Planner they should budget the position.

Q. *I can't find a position in my Org code when I search by position.*

A. It could either have the wrong employee class code on the position in Banner, and thus be in the wrong Salary Planner scenario, or it could be in a different Org code. Call HR for assistance in locating the position.

Q. *My position budget was rounded to the nearest whole dollar and now it is not.*

A. If you selected "copy job to position," then that could have caused the position budget and/or distribution to be the same as the job record and therefore not rounded.

Q. *I have position budgets on my records that were not there last year.*

A. The position budgets have been updated throughout the year as hiring proposals were approved.

### Budget Development

Q. *How can I tell if my index is out of balance?*

A. Look at Summary Totals at the bottom of your Budget Worksheet. Proposed Budget and New Budget columns should net to zero (bottom line). Also, you can run the Index Out of Balance Report in Budget Development to see if you have indices that are out of balance.

Q. *How do I correct an out of balance index?*

A. If you have more revenue than expense, increase your expense account codes to equal revenue or budget a negative 1901 Use of Balance account code. If your expenses exceed revenue, reduce expense account codes to equal revenue.

Q. *Why do I not see the proposed salary information in Budget Development that I entered into Salary Planner?*

A. You must update the position budget and position labor distribution in Salary Planner.

Q. *Can a department have two approvers? For example, one who approves/locks budgets and one who approves/locks salary increases.*

A. Yes. The security for Salary Planner and Budget Development are separate and require separate access roles.

Q. How does the Dean/Chair/Director obtain access to the system to approve salary increases or the overall budget?

A. *By submitting a Banner Authorization Request (BAR) for the Department General Inquiry, Department Budget Developer and/or Department Salary Planner access roles for the highest level organization code appropriate.*