Budget Planner

Overview

Main and Branch Campuses
Overview

Objectives

Access the system

Highlight changes to the process

Review critical events, dates and timeline

Approvals

Salary Planner Information: Faculty Affairs & Services and HR

Mass Salary Update Guidelines

Position Management

Resources: Online resources and contact lists

Budget Planner

Overview Objectives
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.

<table>
<thead>
<tr>
<th>BAR access roles necessary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department General Inquiry</strong></td>
</tr>
<tr>
<td>(Request only highest level organization code – workflow recognizes org hierarchies)</td>
</tr>
</tbody>
</table>

If you have access to Budget Planner but changed departments, you will need to update your BAR organization security for Budget Planner.
Budget Planner

Budget Development

Enter information using:

Budget ID: BUD24

Budget Phase: ADOPTD

All indices with Current Unrestricted funds must be budgeted

No budget equals no spending
Budget Planner

1901 Account Code Restriction

Budgeting 1901 account code for Fiscal Year 2024 is not allowed unless it is preapproved by org level 2 VP Representatives
Transfers and Allocations

A transfer moves revenue (source of funds) **between** programs.

An allocation moves revenue **within** a program.

Please make sure to follow the procedures that are in place.

Revenue should NOT be transferred or allocated from the following:

- State Appropriations also known as Research and Public Service Projects (RPSPs)
- Mandatory Student Fee Indices
- Endowed Spending and Non-Endowed Spending Indices

Expenses incurred should post directly to the same index as the revenue to ensure transparency and to maintain a clean audit trail. We must ensure legislative, student fee review board (SFRB) and donor intent. Donor restrictions must be followed.
Budget Planner

Comments

• Allocations (account codes 16xx) and transfers (account codes 11xx and 12xx) must have offset index, account code, dollar amount, and short purpose.
• Salary adjustments (20SA) must have dollar amount and short purpose.
• Budgeted use of reserves (1901) must have dollar amount, short purpose, and approval information.
Budget Planner

Lock & Unlock Organizations

For Salary Planner

Organization Lock is a link on the Salary Planner Menu –
Must lock/unlock each scenario separately

For Budget Development

Organization Lock is a link on the Budget Planner Menu
– Maintain Organization Lock

Who should lock Organizations?

• Level 1 & 2 Organizations – OPBA (Office of Planning, Budget & Analysis) locks Budget Development and Human Resources locks Salary Planner
• Level 3 Organizations – VP unit representative
• Level 4 & 5 below – College/School/Branch representative
• Level 6 and below – Department Head/Chair/Director or authorized representative
Salary Planner Overview

Mike Brown
Director
HR Client Services

Yvonne Otts
Financial Analyst
HR Finance

THE UNIVERSITY OF NEW MEXICO
Choose Extract ID and Scenario, then select filter criteria.

**Scenario Selection**

**Extract ID:**
- 12FAC24
- 12FAC23
- 9FAC24
- HSTAFF24
- RSTAFF24
- POOL24
- CSTAFF24
- CWA24
- HSTAFF23
- POLICE23
- POLICE24
- USUNM23
- USUNM24

**Scenario:**
- 12_MO_FACULTY_24
- 9_MO_FACULTY_24
- HOUSESTAFF_24
- REG_STAFF_24
- POOLEDPOSITIONS_24
- CONTRACT_STAFF_24
- CWA_BARG_UNIT_24
- POLICE_BARG_UNIT_24
- USUNM_BARG_UNIT_24

**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.

Extract ID & Scenario will now only show the current scenarios & the new budget years scenarios in “Edit Scenario” the older scenarios are masked from this screen to make it easier to navigate.

There are nine (9) scenarios for departments to select from:
- Extract ID and Scenario must be selected in combination as listed below*

  *Extract ID: Scenario:
  - 12FAC24 12_MO_FACULTY_24
  - 9FAC24 9_MO_FACULTY_24
  - HSTAFF24 HOUSESTAFF_24
  - RSTAFF24 REG_STAFF_24
  - POOL24 POOLEDPOSITIONS_24
  - CSTAFF24 CONTRACT_STAFF_24
  - CWA24 CWA_BARG_UNIT_24
  - POLICE24 POLICE_BARG_UNIT_24
  - USUNM24 USUNM_BARG_UNIT_24

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.
Select which Organization number you would like to see or choose all. 
(You will only see Orgs. that you have access.)

Employee Classes for Org. selected will show. Select all to see all the Employee Classes listed.

You may select 25, 50 or 100 records to view all at once.
Salary Planner – Highlights cont.

- All Labor Distributions on both the job and the position must equal 100%. Note: When you update an index or use a new index it must be a valid FY24 index. If not the nightly refresh process will drop that index. The last refresh will be the night of April 14th.

- Verify that the account code on the Position & Job are the same!
Salary Planner Information

Staff Salary Increases

• Overall information on the Budget Planner/Development processes can be found at https://budgetoffice.unm.edu/budget/index.html

• The FY24 Master Salary Planner Guidelines will be published April 11, 2023, following the Board of Regents Meeting, at hr.unm.edu/mass-salary-update

• Questions can be addressed to your HR Consultant - To locate the name of your HR Consultant, visit the following website: lobowebapp.unm.edu/apex_odsf?p=145:1
Salary Planner Information

Contract Staff

• All fiscal year contracts generated last year that included the new auto-renew provision (majority) are scheduled to automatically renew every year on July 1, provided that a non-renewal is not being pursued by the department through their HR Consultant.

• In February, all HR Agents were provided a list of their:
  • contract staff up for auto-renewal,
  • any multi-year contract staff whose contracts are up for renegotiation, and
  • a list of any staff whose contracts are up for renewal that are not on auto-renew or in an executive position with a multi-year agreement (rare).

• For any renegotiated contracts, please ensure that all signed original contract revisions, exceptions and extensions are received by HR Client Services no later than June 1, 2023, to ensure timely processing for the July pay period.
Salary Planner Information

Bargaining Unit Staff

• HR will coordinate the application of any salary modifications that may or may not result from the bargaining negotiations.
• Departments are not required to initiate documentation in these cases.
• Jobs covered under a bargaining agreement will be updated by HR and should not be updated by the departments.
• However, you should continue to budget your bargaining unit positions only, in Salary Planner.
Salary Planner Information

On Call and Term Positions

• On Call
  • Do not move OC positions outside the specified org
  • Budget on the position

• Term Appointments
  • Regardless if the job is extended past June 30, 2023, it will load in Salary Planner. This will allow departments to work on the job and the position in Salary Planner
  • Departments with employees who are on term appointments ending on or before June 30, 2023, and whose terms will not be extended, must submit a separation EPAF along with the appropriate documentation.
Salary Planner Information

Eligible Employees on Unpaid Leave Status

• Do not process changes to employees’ jobs who are on unpaid leave status (FML, Personal and Medical Leave Without Pay, etc.) in Salary Planner.

• However, you should budget the position salary for that employee.

• Departments should submit an ePAN for the appropriate salary adjustment upon return from leave.
Salary Planner Information

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.

<table>
<thead>
<tr>
<th>ID and Name Position, Suffix and Title</th>
<th>Department Totals</th>
<th>Employee Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Salary</td>
<td>Base Salary</td>
</tr>
<tr>
<td></td>
<td>Base Appointment</td>
<td>Proposed</td>
</tr>
<tr>
<td></td>
<td>Percent</td>
<td>Appointment</td>
</tr>
<tr>
<td></td>
<td>Percent</td>
<td>Percent</td>
</tr>
<tr>
<td>0138 Continuing Med Educ Gen Admin</td>
<td>100.00 36,420.80</td>
<td>100.00 36,420.80</td>
</tr>
<tr>
<td>00 - Locked, Updateable</td>
<td>100.00 36,420.80</td>
<td>100.00 36,420.80</td>
</tr>
<tr>
<td>00 Program Manager</td>
<td>100.00 57,607.03</td>
<td>100.00 56,201.98</td>
</tr>
<tr>
<td></td>
<td>57,607.03</td>
<td>57,607.03</td>
</tr>
</tbody>
</table>

Total: 92,022.78 | 1.52 | 1,405.05 | 94,027.83
If a job loads in Salary Planner and you know the employee will be separating prior to 7/1 and the separation paperwork is processed after the Salary Planner refresh, then you must zero out the job in Salary Planner. You can keep the budget on the position.
Office for Academic Personnel

Emily Luhman
Director
Main/Branch Campus Salary Increases

• Overall information on the Budget Planner/Development processes can be found at https://budgetoffice.unm.edu/budget/index.html

• The FY24 Master Salary Update (MSU) Guidelines will be published April 11, 2023 on the Office for Academic Personnel Website (OAP) at https://oap.unm.edu/

• Questions can be addressed to your OAP at faculty@unm.edu or 505-277-4528.
Main/Branch Campus Bargaining Unit Faculty

• OAP will communicate and coordinate the application of any salary modifications that may or may not result from the bargaining negotiations.

• Academic Affairs FY24 Budget Guidelines will provide further instruction on budgeting for bargaining unit faculty. Academic Affairs FY24 Budget Guidelines will be posted on April 11, 2023 at https://budgetoffice.unm.edu/budget/index.html
Research, Term Teacher, and Visiting Faculty Positions

- Research, Term Teacher, and visiting faculty positions will load in Salary Planner so department’s can managing budgeting for the position.
  - For visiting positions, any updates to salary must follow the FY24 MSU Guidelines
  - For research and term teacher faculty positions, salary increases are subject to union negotiations

- Departments should submit the appropriate separation ePAF for positions ending on or before June 30, 2023. Visiting faculty who have completed their 3rd year in a visiting appointment, must be separated via end of contract/term ePAF.

- Extensions for research, term teacher, visiting faculty must follow the applicable extension process:
  - Research Faculty: Departments should submit an extension ePAF with the Research Faculty and Post-Doctoral Fellow Extension Letter
  - Term Teacher/Visiting Faculty: Departments should submit the Renew Non-Continuing Faculty Appointment Request Form along with the applicable appointment letter.
Special Administrative Components

Ongoing SAC’s

• Any special administrative components (SACs) for faculty performing administrative duties which will continue in 2023-2024 should be included in Salary Planner.

New SAC’s

• New SACs for 2023-2024 should not be applied in Salary Planner; however, the SAC should be budgeted in Budget Planner. Refer to the Academic Affairs FY24 Budget Guidelines for guidance. To initiate a new SAC, the department must submit the Special Administrative Appointment SAC Request Form to OAP at faculty@unm.edu.

Ending a SAC

• For SAC’s ending on or before June 30, 2023, enter an amount of zero in the salary for the SAC job record. To terminate a SAC, departments submit complete Special Administrative Appointment SAC Request Form and submit the SAC End ePAF.

Academic Administrators

• Administrative appointments that impact bargaining unit status (Chairperson, Director, Associate Dean) must follow OAP’s requirement for ending/initiating an administrative appointment. Departments should follow OAP requirements for initiating/ending an administrative appointment.
Leave Without Pay (LWOP)

- For faculty members going on LWOP, enter the full base salary instead of zero. This amount will not be encumbered against your department index.

Additional Compensation

- Refer to the Academic Affairs FY24 Budget Guidelines for guidance on budgeting promotional increases, teaching overloads, extra compensation or other types of additional funds to be paid to faculty.
Budget Planner

For critical deadlines, please refer to OPBA Website

http://budgetoffice.unm.edu/budget/index.html

UNM Budget Development Calendar
Budget Planner

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