Main and Branch Campus
Budget Planner

FY18 Overview
Overview Objectives

- Accessing the system
- Highlight changes to the process
- Review critical events, dates and timeline
- Approvals
- Salary Planner Information:
  - Faculty Affairs & Services
  - Human Resources
- Mass Salary Update Guidelines
- Position Management
- Resources: On-line resources and contact lists
Access system 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 necessary

- Department General Inquiry
- Department Budget Developer
  - Request only highest level organization code – workflow recognizes org hierarchies
- Department Salary Planner
  - Request highest level organization code – workflow recognizes org hierarchies

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

Enter information using:

Budget ID: BUD18
Budget Phase: ADOPTD

All indices with Current Unrestricted funds must be budgeted

No budget equals no spending!
1901 account code restriction

Budgeting 1901 account code for Fiscal Year 2018 is not allowed unless it is preapproved by org level 2 EVP Representatives.
• The budget development overnight refresh process no longer unlocks organizations that were previously locked by a college or department.

• Budgeted FTE is correctly calculated on the Budget Development Working and Account Code Totals reports.
For Salary Planner, **Organization Lock** is a link on the Salary Planner menu – Must lock/unlock each scenario separately

For Budget Development, **Maintain Organization Lock** is a link on the Budget Planner Menu

Who should lock Organizations?
- Level 1 & 2 Organizations – OPBA (Office of Planning, Budget & Analysis) locks Budget Development; Human Resources locks Salary Planner
- Level 3 Organizations – EVP unit representative
- Level 4 & 5 below – College/School/Branch representative
- Level 6 and below – the Department Head/Chair/Director or authorized representative
For critical deadlines, refer to OPBA Website
http://budgetoffice.unm.edu/index.html

UNM Budget Development Calendar
2017-2018
Refer to the 9 and 12 month Faculty Standard Operating Procedures (SOPs) at the OPBA website http://www.unm.edu/~budget/sop/ to edit your scenarios.

Budget expense to fund base salary faculty compensation increases in Account Code 20SA and add comment in Budget Planner ($XXX for faculty compensation). Funding noted in 20SA is related to continuing faculty (tenured, tenure-track, and lecturers).

All increases to base salary faculty compensation must be submitted via OFAS Compensation Change Request Form (https://ofas.unm.edu/docs/sfcc/CompChange.pdf)

For Visiting and Research Faculty, in addition to entering salary information into Salary Planner, submit an OFAS Extend Non-Continuing Faculty Appointment Request Form (http://ofas.unm.edu/docs/sfcc/ExtensionRequest.pdf)

Deadlines for Faculty Compensation updates are:

- June 1, 2017 for FY/FE Faculty
- July 3, 2017 for F9 Faculty
• Indicate the SAC for 9 or 12 month faculty receiving a Special Administrative Component. If SAC’s are to be charged to different indices, indicate these different indices and the amounts from each in the comments.

• SAC’s that existed in the 2016-2017 academic year, will automatically have a job display in salary planner. For SAC’s that are continuing, include the amount in the SAC job (suffix starts with an S%) and include the amount in the position budget. These must comply with college/school guidelines. For new SAC’s starting in 2017-2018 academic year, submit an OFAS Special Administrative Component Request form (http://ofas.unm.edu/docs/sfcc/SACRequest.pdf) and include the amount in the Position Budget only, not in the base job. If SAC’s are not renewing for the 2017-2018 academic year, enter an amount of zero for the SAC job and enter a comment.

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

• For Summer Administration, include this amount in the position budget, do not add the amount to the job.
Salary Planner Information
Faculty Affairs & Services – MAIN (cont’d)

• Indicate the 9 or 12 month base salary for all faculty not at 100 Appointment Percent.
• Complete a comment for all faculty not at 100 Appointment Percent.
• Complete a comment for all faculty with joint appointments or split labor distributions.
• Indicate Sabbaticals at 67 Appointment Percent or 100 Appointment Percent, based on the fall semester assignment. Complete a comment for all Sabbaticals and LWOP. Indicate the 9 or 12 month base.
• DO NOT INCLUDE the promotion amount in the Position Budget or the Proposed amount. The promotion funds will be transferred later.
• DO NOT INCLUDE personal information about the faculty member in the comments, such as due to medical leave or due to divorce, etc.
• For retirements, if retirement date is known, indicate in comments.
• For new faculty, indicate whom they are replacing in the comments.
You can now download data from each scenario into an excel spreadsheet. This is a great tool to help you review the data entered. This is available on both the position and the job.

There are nine (9) scenarios for departments to select from:

*Extract ID and Scenario must be selected in combination as listed below*

**Extract ID:**
- 12FAC18
- 9FAC18
- HSTAFF18
- RSTAFF18
- POOL18
- CSTAFF18

**Scenario:**
- 12_MO_FACULTY_18
- 9_MO_FACULTY_18
- HOUSESTAFF_18
- REG STAFF_18
- POOLED_POSITIONS_18
- CONTRACT_STAFF_18

**Union Scenarios:**
- CWA18
- POLICE18
- USUNM18

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.

Extract ID & Scenario will always be the same.
Salary Planner – Highlights

<table>
<thead>
<tr>
<th>Employee</th>
<th>Payment</th>
<th>Finance</th>
</tr>
</thead>
</table>

### Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

**Update of Budget Development**
- Chart of Account: U
- Budget ID: BUD18
- Budget Phase: ADOPTD

#### RSTAFF18, REG_STAFF_18

<table>
<thead>
<tr>
<th>Organizations:</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>007A - HSC Clinical Contracting</td>
</tr>
<tr>
<td></td>
<td>013A - Continuing Medical Educ Department</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Include Subordinate Organizations:</th>
<th>✓</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Employee Class:</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SE - Exempt Staff</td>
</tr>
<tr>
<td></td>
<td>SN - Non-Exempt Staff</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bargaining Unit:</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Faculty Rank:</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

| Include Pooled Positions: | ✓ |
| Include Vacant Positions: | ✓ |
| Number of Records per Page: | 100 |

- List By Employee
- Summary Totals
- List By Position

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3/15/2017 10:58 AM
Verify that the account code on the Job is the same as the account code on the position!

All Labor Distributions on both the job and the position must equal 100%. Note when you update an Index remember that when you enter a new index it must be a valid FY17 index. If not the nightly refresh process will drop that index. The last refresh will be the night of April 17th.
Salary Planner Information
Human Resources

Mike Brown
Director, HR Client Services
Salary Planner Information
Human Resources

Staff Salary Increases

- The State Legislature will determine Cost of Living Adjustment (COLA) for the FY17 Budget year.
- The FY2018 HR Guidelines for Salary Planner will be published shortly. These guidelines will incorporate any COLA directives from the Regents.

Resources
- Check the Human Resources website for latest information on Mass Salary Update Guidelines [http://hr.unm.edu/compensation/mass-salary-update.php](http://hr.unm.edu/compensation/mass-salary-update.php)
- Contact your HR Consultant - To locate the name of your HR Consultant, visit the following website: [http://hr.unm.edu/ocsd/banner/pzrorgh.pdf](http://hr.unm.edu/ocsd/banner/pzrorgh.pdf)
Contract Staff
Contract renewals will occur as normal and will be forwarded by HR Client Services to departments for signatures. Please ensure that all signed original contract revisions, exceptions and extensions are received in HR Client Services not later than June 5, 2017, to ensure processing in time for the July pay period.

Bargaining Unit Employees
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
Human Resources

On Call Positions

- Do not move OC positions outside the specified org
- Budget on the position
Term Appointments

- There will be no job end dates loaded in Banner. For Exempt employees, the hard end dates will be on Default Earnings which will ensure the employee does not get overpaid. Non Exempt employees will not have end dates on the default earnings because of positive time entry.
- All job end dates in Banner will be removed behind the scenes and no action is required from departments. Contract Begin and Contract End Dates will be populated in Banner. Additionally, the Default Earnings will be populated behind the scene for all Exempt employees.
- Regardless if the job is extended past June 30, 2017, it will load in Salary Planner. This will allow departments to work on the job and the position in Salary Planner.
- Departments no longer have to call in to remove future dated records in order to process EPAFS.
For an example of a Term Appointment MOU, go to:
http://hr.unm.edu/docs/compensation/term-appointment-memo-of-understanding.pdf

- Departments with employees who are on term appointments ending on or before June 30, 2017, and whose terms will not be extended, must submit a separation EPAF along with the appropriate documentation.
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.
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.
Appointment Percentage Changes
Changes in Appointment Percentage could be processed through Salary Planner and require a Change in Appointment Percentage EPAF and form.

Exception Requests
Departments are reminded that all proposed personnel transactions involving salary increases outside the approved guidelines must be followed by a formal justification memo with signature approval from the relevant EVP/Chancellor, or designee.

For a copy of the justification memo template go to: http://hr.unm.edu/forms/compensation-forms.php

Exception memos are due to HR no later than June 5, 2017. There can be no exceptions to this rule, since there are significant legal implications associated with awarding retroactive pay increases to public sector employees in the State of New Mexico. Please plan accordingly.
# Salary Planner Information

## Human Resources

<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>Employee Totals</th>
<th>Department Totals</th>
<th>Proposed Job Salary</th>
<th>Extract Status</th>
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</thead>
<tbody>
<tr>
<td>100006344 Archuleta, Marvin T.</td>
<td>S02182 - 00 Accountant 2</td>
<td>100.00 45,426.07</td>
<td>100.00</td>
<td>75.00</td>
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<tr>
<td>1000479171 Beenhouwer, Kyle</td>
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<td>100.00</td>
<td>36,999.96</td>
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<tr>
<td>101499905 Hatcher, James C.</td>
<td>S06887 - 00 Sr IT Support Tech</td>
<td>100.00 36,598.65</td>
<td>100.00</td>
<td>35,706.00</td>
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<tr>
<td>100251717 Holub Justin M.</td>
<td>S09090 - 00 Coord, Education Support</td>
<td>100.00 33,046.00</td>
<td>100.00</td>
<td>32,240.00</td>
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<tr>
<td>100010484 Holub Paula R.</td>
<td>S03276 - 00 Academic Ops Ofcr</td>
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<td>100.00</td>
<td>88,730.17</td>
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<td>101663334 Ibrahim, Olia A.</td>
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<td>100013675 Lofton, Ramsey A.</td>
<td>S04376 - 00 Supy, Community Ed Programs</td>
<td>100.00 53,483.13</td>
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<td>39,340.00</td>
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<td>100011217 Lucero, Jennifer C.</td>
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<td>100008219 Mulcahy, Deanna S.</td>
<td>S02630 - 00 Mgr Academic Advisement</td>
<td>100.00 64,103.55</td>
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<td>100854119 Narducci, Vincent T</td>
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<td>1000352030 Perovich, Rachel S.</td>
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<td>1000024008 Wyndorf, Glinda M.</td>
<td>S04890 - 00 Admin Assistant to the Dean</td>
<td>100.00 46,536.67</td>
<td>100.00</td>
<td>45,401.63</td>
<td>Changed</td>
</tr>
</tbody>
</table>
Salary Planner Information
Human Resources

• If the legislature approves a COLA adjustment, and the department also wants to give an additional exception adjustment, then you will add a total of two percentage adjustments to the FY17 Base salary to come up with the FY18 Base salary. Do not add the COLA adjustment to the FY17 Base salary and then apply the exception adjustment:

\[
\text{FY17 Base} \times (\text{COLA} \% + \text{Exception}\%) = \text{FY18 Base}
\]

You can enter exceptions in Salary Planner as long as you have obtained approval for the exception.

• If you are unable to process the COLA in Salary Planner, then you must submit an epan with a Job Change Reason of ANSAL. If you are submitting an EPAN to process an exception, then the Job Change Reason will be ANADJ.

• 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. Eligible employees on unpaid leave will receive the COLA upon return from leave through submittal of an EPAN.
Salary Planner Information
Human Resources

• HSC Lab Working Sessions (HSLIC # 226)
  ◦ Thursday, March 16th 10:00 am-12:00pm
  ◦ Monday, March 20th 01:00-3:00 pm
  ◦ Tuesday, March 21st 10:00 am-12:00pm
  ◦ Wednesday, March 22nd 01:00-3:00 pm
  ◦ Thursday, March 23rd 10:00 am-12:00pm

• Main Campus Lab Working Sessions Tech 260 & 160 (building 64)
  ◦ Wednesday, March 29th 01:00-03:00 Tech 260 Bldg. 64
  ◦ Thursday, April 6th 01:30-03:30 Tech 180 Bldg. 64
  ◦ Tuesday, April 11th 09:30-11:30 Tech 260 Bldg. 64
# Contacts

## Main Campus Budget Office
- Norma Allen  
  277-7630  
  nallen@unm.edu  
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  277-6466  
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- Natalia Koup  
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  nkoup@unm.edu  
- Regina Dominguez  
  277-7632  
  rmunoz@unm.edu  
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  tstephen@unm.edu

## Faculty Contracts & Services Office - MAIN
- Theresa Ramos  
  277-4862  
  tramos@unm.edu

## Academic Affairs
- Nicole Dopson  
  277-8126  
  nicole14@unm.edu  
- Francisco Certain  
  277-2196  
  fcertain@unm.edu

## Human Resources Division
- Alex Lopez (Salary Planner)  
  277-5811  
  tuflop@unm.edu  
- Mike Brown (HR Client Services)  
  277-2854  
  mikebrown@unm.edu  
- HRPR Transaction Center  
  277-4777  
  Help with navigational issues in Salary Planner  
  HRPR email: HRPR@unm.edu  
  Referral to the correct Subject Matter Expert for your question
The End