Fiscal Year 2019

Main and Branch Campus
Budget Planner

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
**Budget Planner System Access**

- 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: BUD19
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 2019 is not allowed unless it is preapproved by org level 2 EVP Representatives
New Index for Mandatory Student Fees
(revenue account codes: 02Z1, 02Z2 and 02Z3)

Per Student Fees Review Board (SFRB) starting Fiscal Year 2019 a separate index or new index is required in order to track expenditures funded by Mandatory Student Fees.
Locking = Approved
Unlocking = Unapproved

• 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
2018-2019
OPBA website

Refer to the 9 and 12 month Faculty Standard Operating Procedures (SOPs) at the OPBA website [http://www.unm.edu/~budget/sop/](http://www.unm.edu/~budget/sop/) to edit your scenarios.

**Account Code 20SA**

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).

**Increases**

All increases to base salary faculty compensation must be submitted via OFAS Compensation Change Request Form ([http://ofas.unm.edu/faculty/compensation/documents/comp-change.pdf](http://ofas.unm.edu/faculty/compensation/documents/comp-change.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/faculty/compensation/documents/extension-request.pdf](http://ofas.unm.edu/faculty/compensation/documents/extension-request.pdf))

**Deadlines for Faculty Compensation Updates**

- June 1, 2018 for FY/FE Faculty
- July 3, 2018 for F9 Faculty
Special Admin Components

- 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 2017-2018 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.


- If SAC’s are not renewing for the 2018-2019 academic year, enter an amount of zero for the SAC job and enter a comment. Submit a SAC form to end.

Leave Without Pay

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

Summer Admin

- For Summer Administration, include this amount in the position budget, do not add the amount to the job.
Faculty

- Indicate the 9 or 12 month base salary for all faculty not at 100 Appointment Percent.
- Complete a comment for all faculty who are 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.

Retirees

- For retirements, if retirement date is known, indicate it in comments.

New Faculty

- For new faculty, indicate whom they are replacing in comments.

Do Not Include

- Promotion amounts in the Position Budget or the Proposed amount. The promotion funds will be transferred later.
- Personal information in the comments, such as due to medical leave or due to divorce, etc.
Salary Planner Information

Alex Lopez
Financial Analyst, HR Finance, IT and Business Services
Salary Planner – Highlights

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 DEPARMENTS TO SELECT FROM
*Extract ID and Scenario must be selected in combination as listed below*

Extract ID: Scenario:
12FAC19 12_MO_FACULTY_19
9FAC19 9_MO_FACULTY_19
HSTAFF19 HOUSESTAFF_19
RSTAFF19 REG STAFF_19
POOL19 POOLED_POSITIONS_19
CSTAFF19 CONTRACT_STAFF_19

UNION SCENARIOS
CWA19 CWA_BARG_UNIT_19
POLICE19 POLICE_BARG_UNIT_19
USUNM19 USUNM_BARG_UNIT_19

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.
**MASS CHANGE SECTION** -- THIS SECTION IS TO MASS APPLY POSITION BUDGET INCREASES (DO NOT USE THIS SECTION IF NOT MASS APPLYING INCREASES)

**PERCENT BOX** – ENTER A PERCENT TO MASS APPLY

**AMOUNT BOX** – ENTER A DOLLAR AMOUNT TO MASS APPLY

CLICK ON MASS APPLY BUTTON FOR MASS APPLY OPTIONS TO BE APPLIED

IF SATISFIED WITH MASS APPLY CLICK ON SAVE BUTTON AT BOTTOM OF SCREEN

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**List By Position**

Update of Budget Development
Chart of Account:

| Budget 10: | UBD19 | ADOPTD |

**Mass Change**

Percent: 
Amount: 

**Buttons**

- **COPY PROPOSED SALARY TO BUDGET** to update all positions to match job amounts
- **CLICK ON DOWNLOAD POSITION DATA BUTTON** to open or save job data to an Excel spreadsheet
- **CLICK ON DOWNLOAD POSITION AND DISTRIBUTION BUTTON** to open or save job and labor distribution data to an Excel spreadsheet.
All Labor Distributions on both the position and the Job must equal 100% Note when you update an Index remember that when you enter a new index it must be a valid FY19 index. If not the nightly refresh process will drop that index. The last refresh will be the night of April 16th.

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

Martin Gallegos
HR Consultant
Staff Salary Increases

- The State Legislature will determine if any Cost of Living Adjustment (COLA) for the FY19 Budget year.
- The FY2019 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 (Guidelines to be published when finalized)
- Contact your HR Consultant - To locate the name of your HR Consultant, visit the following website: [https://www8.unm.edu/apex_ods/f?p=145:1](https://www8.unm.edu/apex_ods/f?p=145:1)
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 4, 2018, to ensure processing in time for the July pay period.

Bargaining Unit Employees
For the time being, you should continue to budget your bargaining unit positions without an MSU increase factored into the budgeted salary. Negotiations with the unions are ongoing to discuss the potential approval and application of an MSU increase and any other MSU exceptions that may be agreed to with each respective union. Further information will be published by HR when these decisions are made with the union(s).
Salary Planner Information

On Call Positions

- Do not move OC positions outside the specified org
- Budget on the position
Salary Planner Information

**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.

- 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, 2018, it will load in Salary Planner. This will allow departments to work on the job and the position in Salary Planner.
For an example of a Term Appointment MOU, go to:
https://hr.unm.edu/docs/employment/term-appointment-memo-of-understanding.pdf

- Departments with employees who are on term appointments ending on or before June 30, 2018, 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.

*The exception memo template will be published by HR once the parameters/guidelines of the exception(s) are finalized by university leadership.

Exception memos are due to HR no later than June 4, 2018. 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.
<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>Employee Totals</th>
<th>Department Totals</th>
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<td>100006344 Arquileta, Marvin T.</td>
<td>S02182 - 00 Accountant 2</td>
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<td>101499905 Hatcher, James C.</td>
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<td>100251717 Holub, Jacek M.</td>
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<td>100010481 Holub, Paula R.</td>
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<td>101663334 Ibrahim, Olia A.</td>
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<td>100008219 Mulchay, Deanna S.</td>
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<td>100854119 Narducci, Vincent J.</td>
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<td>100024008 Wendorf, Glenda M.</td>
<td>S04990 - 00 Admin Assistant to the Dean</td>
<td>100.00 46,536.67</td>
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</tbody>
</table>
Salary Planner Information

• 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 FY18 Base salary to come up with the FY19 Base salary. Do not add the COLA adjustment to the FY18 Base salary and then apply the exception adjustment:

\[ \text{FY18 Base} \ast (\text{COLA} \% + \text{Exception}\%) = \text{FY19 Base} \]

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

- HSC Lab Working Sessions (HSLIC # 226)
  - Monday, March 19th, 01:00-3:00 pm
  - Wednesday, March 21st, 10:00 am-12:00pm
  - Monday, March 26th, 01:00-3:00 pm

- Main Campus Lab Working Sessions Tech 260 & 160 (building 64)
  - Wednesday, March 28th, 01:30-03:30, Tech 180 Bldg. 64
  - Wednesday, April 4th, 01:30-03:30, Tech 180 Bldg. 64
  - Tuesday, April 10th, 09:30-11:30, Tech 160 Bldg. 64
# Contacts

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