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**

<table>
<thead>
<tr>
<th>Department General Inquiry</th>
<th>Department Budget Developers</th>
<th>Department Salary Planner</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Request only highest level organization code – workflow recognizes org hierarchies)</td>
<td>(Request Highest level organization code - workflow recognizes org hierarchies)</td>
<td></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: BUD22

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 2022 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
Yvonne Otts
Accountant 3, HR Finance, IT and Business Services
Salary Planner – Highlights

Choose Extract ID and Scenario, then select filter criteria

**Scenario Selection**
- **Extract ID:**
  - 12FAC22
  - 9FAC22
  - CSTAFF21
  - CSTAFF22
  - CWA21
  - CWA22
  - HSTAFF21
  - HSTAFF22
  - POLICE21
  - POLICE22
  - POOL21
  - POOL22
  - RSTAFF21
  - RSTAFF22
  - USUNM21
  - USUNM22
- **Scenario:**
  - 12_MO_FACULTY_22
  - 9_MO_FACULTY_22
  - HOUSESTAFF_22
  - REG STAFF_22
  - POOLED_POSITIONS_22
  - CONTRACT_STAFF_22
  - CWA_BARG_UNIT_22
  - POLICE_BARG_UNIT_22
  - USUNM_BARG_UNIT_22

**Filter Criteria**
- **By Position**
- **By Employee**

**Notes:**
- 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:
  - 12FAC22 12_MO_FACULTY_22
  - 9FAC22 9_MO_FACULTY_22
  - HSTAFF22 HOUSESTAFF_22
  - RSTAFF22 REG STAFF_22
  - POOL22 POOLED_POSITIONS_22
  - CSTAFF22 CONTRACT_STAFF_22
  - CWA21 CWA_BARG_UNIT_22
  - POLICE21 POLICE_BARG_UNIT_22
  - USUNM21 USUNM_BARG_UNIT_22

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.
### Salary Planner – Highlights

**Position Filters**

Select which organization number you would like to see, or choose all. (You will only see orgs. That you have access.)

**RSTAFF19, REG STAFF 19**

- **Organizations:**
  - Include Subordinate Organizations: 
  - Employee Class: 
  - Bargaining Unit: 
  - Faculty Rank: 
  - Include Pooled Positions: 
  - Include Vacant Positions: 
  - Number of Records per Page: 100

**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.

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

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 FY21 index. If not the nightly refresh process will drop that index. The last refresh will be the night of April 20th.
Salary Planner Information
Mike Brown, Manager
HR Client Services
Staff Salary Increases

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

• The FY21 Master Salary Planner Guidelines will be published April 14, 2021 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_ods/f?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.

• On February 24, 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, 2021, to ensure timely processing for the July pay period.
Salary planner information

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

Minimum Wage Increases

• To remain compliant with state law, UNM will increase the minimum wage to $11.50 effective January 1, 2022.

• For I&G-funded employees, departments should not budget for these increases in Budget/Salary Planner. That will be handled mid-year through budget revisions.

• Self-supporting/auxiliary units that wish to budget for the increases may budget expense in 20SA and offset revenues for this purpose.

• For specific questions regarding minimum wage increases, please contact the relevant employment area.
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, 2021, 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, 2021, 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.
Salary planner information

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.
1. General Information
2. Procedures
3. Increases
4. SAC’s
5. LWOP & Summer Admin
6. Reminders
7. Forms
General Information

OPBA website

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

Deadlines for Faculty Compensation Updates

- Visit the OFAS homepage ofas.unm.edu to view monthly deadline calendar please note that due to the volume of submissions, FE and FY are prioritized. F9 data will not be entered until FE & FY are completed due to the 07/01 effective dates.
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

- If retirement date is known, note it in the comments. Note: return to work rules.

New Faculty

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

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 i.e. tenured, tenure-track, and lecturers only.

Submitting Increases

Increases to any faculty (all types) base salaries must be submitted via:

- Compensation Change Request Form

Visiting and Research Faculty

Ineligible for MSU. Extend by submitting one of the following EPAFs:

- Faculty Job Ext. (Research, Post Doc, Visiting) Unstr.
- Faculty Job Ext w/ Appt Chg Rstrct. LD,
- Faculty Job Ext. (Research, Post Doc, Visiting) Rstrct. LD
- Faculty Job Ext. w/ Appt Chg Unstr (LD), JF0036

NOTE: Third year Visiting Faculty must be separated via end of contract/term EPAF.
Special Admin Components

New SAC’s

• Indicate the SAC for 9 or 12 month faculty receiving a SAC.

• For new SAC’s starting in the new academic year, submit an OFAS Special Administrative Component Request form and include the amount in the Position Budget only, not in the job. If SAC’s are to be charged to different indices, indicate these different indices and the amounts from each in the comments.

Ongoing SAC’s

• SAC’s that existed in the previous 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.

SAC Salary

• Rates must be in accordance with the college/school guidelines.

Ending a SAC

• If SAC’s are not renewing for the new academic year 1. enter an amount of zero for the SAC job, 2. enter a comment 3. Submit an EPAF to end the SAC to end the assignment. NEW EPAF
LWOP & Summer Admin

**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.

**Summer Admin**

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

**Summer Research**

- For Summer Research submit based on approved salary only.
  
  - Example: May and June salary are already approved for the current fiscal year, July and August are based on new fiscal year salary rates including increases and or SAC amounts.
Reminders

Promotions

• Promotion amounts are on listed in the Position Budget. The promotion funds will be transferred later. OFAS Manually add the promotion amount to the job.

Ending a SAC

• Budgeting a SAC for zero won’t end it will just create a record with zero pay, to end the SAC submit an “Faculty Request to end Admin. Appt. (SAC)”

Comments

• Copy budget comments to the job, if you don’t OFAS can’t see them 😃
• Don’t include personal information in the comments, such as due to medical leave or due to divorce, etc.
<table>
<thead>
<tr>
<th>Form</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Change Request Form</td>
<td>Continuing faculty</td>
</tr>
<tr>
<td>Extend Non-Continuing Faculty Appointment Request Form</td>
<td>Non-Continuing faculty</td>
</tr>
<tr>
<td>Faculty Administrative Appointment and/or SAC Request Form</td>
<td>Continuing faculty</td>
</tr>
<tr>
<td></td>
<td>SAC - EPAF</td>
</tr>
</tbody>
</table>
FY 2022 Budget Planner

For critical deadlines, please refer to OPBA Website

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

UNM Budget Development Calendar
2021-2022
# FY 2022 Budget Planner

## CONTACTS

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- Rosenda Flores 277-6466  rflores4@unm.edu

**Faculty Contracts & Services Office - MAIN**

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- Francisco Certain 277-2196  fcertain@unm.edu
- Kara Camp 277-1741  moellerk@unm.edu

**Human Resources Division**

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- Mike Brown (HR Client Services) 277-2854  mikebrown@unm.edu