FY 2020 Budget Planner

Overview

Main and Branch Campuses
FY 2020 Budget Planner

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
FY 2020 Budget Planner

System Access

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.
FY 2020 Budget Planner

Budget Development

Enter information using:

Budget ID: BUD20
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 2020 is not allowed unless it is preapproved by org level 2 VP Representatives
Index for Mandatory Student Fees
(revenue account codes: 02Z1, 02Z2 and 02Z3)

Per the Student Fee Review Board (SFRB), a separate index is requested in order to track expenditures funded by Mandatory Student Fees. The activity code must be “Y19MSF”.
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.
FY 2020 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 Information

Alex Lopez
Financial Analyst, HR Finance, IT and Business Services
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.
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.

List By Position

Enter a Mass Change and select Mass Apply, or modify an individual position and select Save. Rounding applies to Mass Changes and Individual position changes.

Update of Budget Development
Chart of Account: U
Budget ID: R0120
ADOPTD

**MASS CHANGE SECTION – THIS SECTION IS TO MASS APPLY POSITION BUDGET INCREASES (DO NOT USE THIS SECTION IF NOT MASS APPLYINGCREASES)**

**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**

**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.

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**013B - Continuing Med Educ Gen Admin, Unlocked**

<table>
<thead>
<tr>
<th>Position and Title</th>
<th>Base Appointment Percent</th>
<th>Proposed Appointment Percent</th>
<th>Base FTE</th>
<th>Proposed FTE</th>
<th>Base Budget</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Budget</th>
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<tbody>
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**Total**                       | 3.00                     | 3.00                          | 0.00     | 0.00         | 57,607.00   | .00            | .00           | 57,607.00       |

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**RSTAFF19 - REG STAFF 19**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Include Subordinate Organizations</th>
<th>Employee Classifications</th>
<th>Bargaining Unit</th>
<th>Faculty Rank</th>
<th>Include Positions</th>
<th>Include Vacant Positions</th>
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<tr>
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<td>Yes</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>Yes</td>
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**Summary**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Base Appointment Percent</th>
<th>Proposed Appointment Percent</th>
<th>Base FTE</th>
<th>Proposed FTE</th>
<th>Base Budget</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Budget</th>
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<tr>
<td>013B - Continuing Med Educ Gen Admin</td>
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<td>57,607.00</td>
<td>.00</td>
<td>0.00</td>
<td>57,607.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total**                       | 3.00                     | 3.00                          | 0.00     | 0.00         | 57,607.00   | .00            | .00           | 57,607.00       |

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**Buttons**

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**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 FY20 index. If not the nightly refresh process will drop that index. The last refresh will be the night of April 15th.

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

Mike Brown
Director, HR Client Services
Staff Salary Increases

- The State Legislature will determine if any Cost of Living Adjustment (COLA) for the FY20 Budget year.
- The FY2020 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
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 3, 2019, 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
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, 2019, it will load in Salary Planner. This will allow departments to work on the job and the position in Salary Planner.
Salary Planner Information

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, 2019, 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 3, 2019. 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

<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>Employee Totals</th>
<th>Department Totals</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Job Salary</th>
<th>Extract Status</th>
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<tbody>
<tr>
<td>10006344 Archuleta, Marvin T.</td>
<td>S02182 - 00 Accountant 2</td>
<td>100.00</td>
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<tr>
<td>100851119 Narducci, Vincent J.</td>
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<td>100352030 Perovich, Rachel S.</td>
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<td>38,665.00</td>
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<tr>
<td>100024008 Wyndorf, Glinda M.</td>
<td>S04850 - 00 Admin Assistant to the Dean</td>
<td>100.00</td>
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<td>2.50</td>
<td>1,135.04</td>
<td>46,536.67</td>
<td>Changed</td>
</tr>
</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 FY19 Base salary to come up with the FY20 Base salary. Do not add the COLA adjustment to the FY19 Base salary and then apply the exception adjustment:

  \[ \text{FY19 Base} \times (\text{COLA} \% + \text{Exception}\%) = \text{FY20 Base} \]

  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 18th  
    01:00 - 03:00
  - Wednesday, March 20th  
    10:00 - 12:00
  - Thursday, March 21st  
    01:00 - 03:00

- **Main Campus Lab Working Sessions Tech 260 & 160 (building 64)**
  - Thursday, March 28th  
    01:30 - 3:30  
    Tech 180 Bldg. 64
  - Wednesday, April 3rd  
    9:30 - 11:30  
    Tech 180 Bldg. 64
  - Tuesday, April 9th  
    01:30 - 3:30  
    Tech 160 Bldg. 64
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](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 then, F9’s. F9 data will not be entered until after.
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, note it in the comments.

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

All increases to base salary faculty compensation must be submitted via OFAS Compensation Change Request Form

Visiting and Research Faculty

Enter into salary information Salary Planner
Submit an Extend Non-Continuing Faculty Appointment Request Form
Special Admin Components

New SAC’s

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

• For new SAC’s starting in 2019-2020 academic year, submit an OFAS Special Administrative Component Request form and include the amount in the Position Budget only, not in the job. http://ofas.unm.edu/faculty/compensation/documents/sac-request-7-15-16.pdf

• 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 a SAC form to end the assignment.
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.

Side note on Summer Research

- For Summer Research consider submitting based on May and June salary – approved amounts current fiscal year, July and August is based on new fiscal year salary rates including increases and or SAC amounts.
Promotions

• Promotion amounts in the Position Budget or the Proposed amount. The promotion funds will be transferred later.

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 a form

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.
## Forms

<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>
</tbody>
</table>
FY 2020 Budget Planner

For critical deadlines, please refer to OPBA Website
http://budgetoffice.unm.edu/index.html

UNM Budget Development Calendar
2019-2020
FY 2020 Budget Planner

Main Campus Budget Office
Norma Allen  277-7630  nallen@unm.edu
Natalia Koup  277-2052  nkoup@unm.edu
Regina Dominguez  277-7632  rmunoz@unm.edu
Rosenda Flores  277-6466  rflores4@unm.edu
Matt Gomez  277-6465  mgomez202@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
Kara Camp  277-1741  moellerk@unm.edu

Human Resources Division
Alex Lopez (Salary Planner)  277-5811  tuflop@unm.edu
Mike Brown (HR Client Services)  277-2854  mikebrown@unm.edu