Getting Ready For Main Campus FY 2019 Year-End Projections and Mid-year Reviews

Presented by the Office of Planning, Budget & Analysis
Projections: What Am I Trying To Do?

- You are projecting what your ending YTD activity and balances will be at June 30, 2019
- You are not creating *budgets*—you are creating *projected actuals*
- Main Campus departments input their projections into the Budget Planner System
- The system opens on January 2, 2019 and closes on January 25, 2019 at 5 pm.
Mid-year Reviews: What Are They?

- Presentation of expected June 30, 2019 actuals to your VP Unit and/or Office of Planning, Budget & Analysis

- Presentation should include:
  - Projected ending balances at June 30, 2019
  - Please use the *Main Campus Current Unrestricted Financial Projections by Exhibit Report* located under the Budget Planner Projected Actuals Reports menu

- Presentation may also include:
  - Budget to Projected Actuals Report located in the Budget Planner Projected Actuals Reports menu if requested by your VP Unit
What Do I Need to Do to Get Ready?

Step 1

- Before December 31, 2018, *Get Banner-Ready!*

  - Make sure your indices are reconciled
  - Make sure you have processed material budget revisions, P-Card reallocations, and journal vouchers
  - Make sure you have processed all HR paperwork such as e-Pans and PHAREDS
  - Make sure to process deficit reduction plan in Banner

  *Because*……

  Financial projections are based on December 31, 2018 data
Step 2

- Get **YOU** ready
  - Make sure you have the correct access roles and training
    - Department General Inquiry access role
    - Department Budget Developer access role, including the correct organizational security (if you changed departments within the last year, make sure your org security is up-to-date)
  - Review the FY19 Main Campus Projection Overview. See OPBA’s website for the PowerPoint presentation.
    - [http://www.unm.edu/~budget/Mid-Year%20Reviews/](http://www.unm.edu/~budget/Mid-Year%20Reviews/)
  - Read the Mid-Year Review information on OPBA’s website
    - [http://www.unm.edu/~budget/Mid-Year%20Reviews/](http://www.unm.edu/~budget/Mid-Year%20Reviews/)
Note

Your VP unit has its own procedure and will contact your organization with information on

- the projection system
- training
- procedures
- mid-year review schedule
To report system or report problems, contact OPBA at budget@unm.edu or call 277-6465.

For general questions, contact:

<table>
<thead>
<tr>
<th>Department</th>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPBA/Administration</td>
<td>Natalia Koup</td>
<td>277-2052</td>
<td><a href="mailto:nkoup@unm.edu">nkoup@unm.edu</a></td>
</tr>
<tr>
<td></td>
<td>Deb Johnston</td>
<td>277-6466</td>
<td><a href="mailto:djohnsto@unm.edu">djohnsto@unm.edu</a></td>
</tr>
<tr>
<td>Provost Office</td>
<td>Nicole Dopson</td>
<td>277-8126</td>
<td><a href="mailto:nicole14@unm.edu">nicole14@unm.edu</a></td>
</tr>
<tr>
<td></td>
<td>Francisco Certain</td>
<td>277-2196</td>
<td><a href="mailto:fcertain@unm.edu">fcertain@unm.edu</a></td>
</tr>
<tr>
<td>Student Affairs</td>
<td>Kim Kloeppe1</td>
<td>277-0957</td>
<td><a href="mailto:kimmerly@unm.edu">kimmerly@unm.edu</a></td>
</tr>
<tr>
<td>President</td>
<td>Francisco Certain</td>
<td>277-2196</td>
<td><a href="mailto:fcertain@unm.edu">fcertain@unm.edu</a></td>
</tr>
</tbody>
</table>
The End