Getting Ready For Main Campus
FY 2020 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, 2020.
- 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, 2020 and closes on January 24, 2020 at 5 pm.
Mid-year Reviews: What Are They?

- Presentation of expected June 30, 2020 actuals to your VP Unit and/or Office of Planning, Budget & Analysis

- Presentation should include:
  - Projected ending balances at June 30, 2020
  - 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, 2019, 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, 2019 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 FY20 Main Campus Projection Overview. See OPBA’s website for the PowerPoint presentation.
    http://budgetoffice.unm.edu/assets/documents/projections/projections-system-overview.pdf
  - Read the Mid-Year Review information on OPBA’s website
    http://budgetoffice.unm.edu/projections-and-mid-year-review/index.html
Your VP unit has its own procedure and will contact your organization with information on:

- the projection system
- training
- procedures
- mid-year review schedule
Main Campus Contact List

- To report system or report problems, contact OPBA at budget@unm.edu or call 277-6465.
- For general questions, contact:

  **OPBA/Administration**
  - Natalia Koup 277-2052 nkoup@unm.edu

  **Provost Office**
  - Nicole Dopson 277-8126 nicole14@unm.edu
  - Francisco Certain 277-2196 fcertain@unm.edu

  **Student Affairs**
  - Kim Kloeppe 277-0957 kimmerly@unm.edu

  **President**
  - Francisco Certain 277-2196 fcertain@unm.edu
The End