GETTING READY YEAR-END PROJECTIONS
MAIN AND BRANCH CAMPUSES
Projections: What am I trying to do?

- You are projecting what your ending YTD activity and balances will be at June 30, 2023

- 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 3, 2023 and closes on January 20, 2023 at 5 pm.
Mid-year Reviews: What are they?

Presentation of expected June 30, 2023 actuals to your VP Unit and/or Office of Planning, Budget & Analysis

Presentation should include:

- Projected ending balances at June 30, 2023
- 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, 2022, *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
  - Make sure to process deficit reduction plan in Banner

*Because*....

Financial projections are based on
December 31, 2022 data
What do I need to do to get ready

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 FY23 Main Campus Projection Overview. See OPBA's website for the PowerPoint presentation. http://budgetoffice.unm.edu/
- Read the Mid-Year Review information on OPBA's website http://budgetoffice.unm.edu/
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
Main Campus Contact List

To report system or report problems, contact OPBA at budget@unm.edu

For general questions, contact:

OPBA/Administration
   Natalia Koup                      nkoup@unm.edu

Provost and Student Affairs
   Nicole Dopson                    nicole14@unm.edu
   Francisco Certain                fcertain@unm.edu

President
   Francisco Certain                fcertain@unm.edu
The End