Getting Ready For Main Campus
FY 2021 Year-End Projections
and
Mid-year Reviews

Presented by the Office of Planning, Budget & Analysis
You are projecting what your ending YTD activity and balances will be at June 30, 2021

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 4, 2021 and closes on January 22, 2021 at 5 pm.
Mid-year Reviews: What Are They?

- Presentation of expected June 30, 2021 actuals to your VP Unit and/or Office of Planning, Budget & Analysis

- Presentation should include:
  - Projected ending balances at June 30, 2021
  - 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, 2020, 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, 2020 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 FY21 Main Campus Projection Overview. See OPBA’s website for the PowerPoint presentation. [http://budgetoffice.unm.edu/](http://budgetoffice.unm.edu/)
  - Read the Mid-Year Review information on OPBA’s website [http://budgetoffice.unm.edu/](http://budgetoffice.unm.edu/)
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 Academic Affairs
  Nicole Dopson nicole14@unm.edu
  Francisco Certain fcertain@unm.edu
  President
  Francisco Certain fcertain@unm.edu
The End