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# GETTING READY YEAR-END PROJECTIONS MAIN AND BRANCH CAMPUSES

PREPARED BY THE OFFICE OF PLANNING, BUDGET AND ANALYSIS

# Projections: What am I trying to do?

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- ❑ You are projecting what your ending YTD activity and balances will be on June 30, 2025
- ❑ 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, 2025 and closes on January 23, 2025 at 5 pm.

# Mid-year Reviews: What are they?

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Presentation of expected June 30, 2025 actuals to your VP Unit and/or Office of Planning, Budget & Analysis

Presentation should include:

- ☐ Projected ending balances on June 30, 2025
- ☐ 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

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❑ Before December 31, 2024, *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, 2024 data**

# What do I need to do to get ready

## Step 2

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### 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 FY25 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

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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

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To report system or report problems, contact OPBA at [budget@unm.edu](mailto:budget@unm.edu)

For general questions, contact:

OPBA/Administration

Natalia Koup

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# The End

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