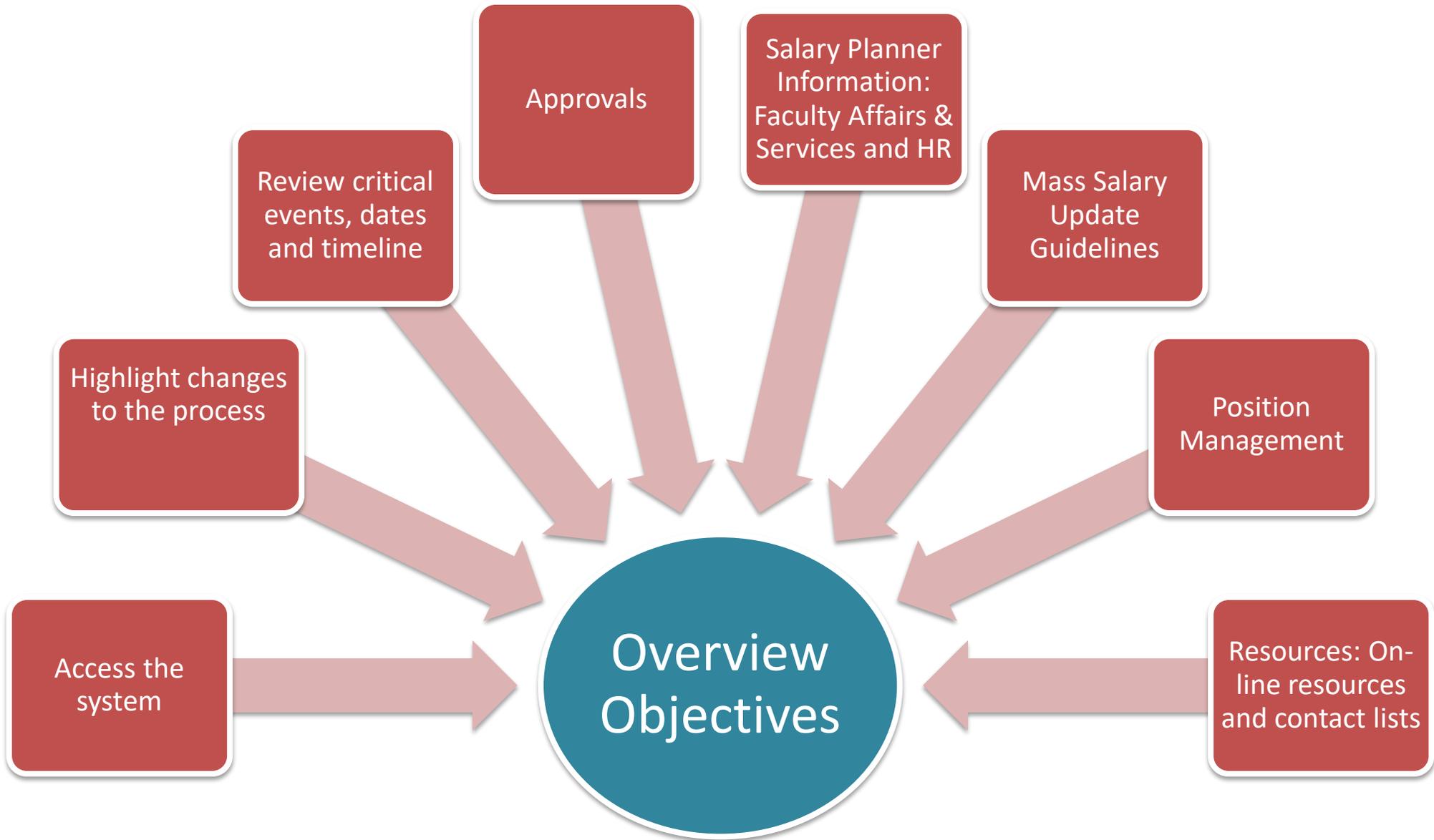


Budget Planner

Overview

Main and Branch Campuses

Budget Planner



Budget Planner

System Access

New users must take the Budget Planner Online Course and pass the Budget Planner Proficiency Exam on Learning Central in order to get access to the system

BAR access roles necessary

Department General
Inquiry

Department Budget
Developers
(Request only highest level organization code – workflow recognizes org hierarchies)

Department Salary
Planner
(Request Highest level organization code - workflow recognizes org hierarchies)

If you have access to Budget Planner but changed departments, you will need to update your BAR organization security for Budget Planner

Budget Planner

Budget Development

Enter information using:

Budget ID: BUD26

Budget Phase:
ADOPTD

**All indices with Current Unrestricted funds
must be budgeted**

No budget equals no spending

Budget Planner

1901 Account Code Restriction

Budgeting 1901 account code for Fiscal Year 2025 is not allowed unless it is preapproved by org level 2 VP Representatives

Budget Planner

Transfers and Allocations

A transfer moves revenue (source of funds) between programs.

An allocation moves revenue within a program.

Please make sure to follow the procedures that are in place.

Revenue should NOT be transferred or allocated from the following:

- State Appropriations also known as Research and Public Service Projects (RPSPs)
- Mandatory Student Fee Indices
- Endowed Spending and Non-Endowed Spending Indices

Expenses incurred should post directly to the same index as the revenue to ensure transparency and to maintain a clean audit trail. We must ensure legislative, student fee review board (SFRB) and donor intent. Donor restrictions must be followed.

Budget Planner

Comments

- Allocations (account codes 16xx) and transfers (account codes 11xx and 12xx) must have offset index, account code, dollar amount, and short purpose.
- Salary adjustments (20SA) must have dollar amount and short purpose.
- Budgeted use of reserves (1901) must have dollar amount, short purpose, and approval information.

Budget Planner

Lock & Unlock Organizations

For Salary Planner

Organization Lock is a link on the Salary Planner Menu –
Must lock/unlock each scenario separately

For Budget Development

Organization Lock is a link on the Budget Planner Menu
– Maintain Organization Lock

Who should lock Organizations?

- Level 1 & 2 Organizations – OPBA (Office of Planning, Budget & Analysis) locks Budget Development and Human Resources locks Salary Planner
- Level 3 Organizations – VP unit representative
- Level 4 & 5 below – College/School/Branch representative
- Level 6 and below – Department Head/Chair/Director or authorized representative

Salary Planner Overview



1700

HUMAN RESOURCES

Mike Brown
Director

HR Client Services

Yvonne Otts
Financial Analyst

HR Finance

THE UNIVERSITY OF NEW MEXICO

Salary Planner – Highlights

Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID: 12FAC26 ▾

Scenario: 12FAC25 ▾

Filter Criteria:

By Position 9FAC26

By Employee CSTAFF25

Select

12FAC26

9FAC25

9FAC26

CSTAFF25

CSTAFF26

CWA25

CWA26

HSTAFF25

HSTAFF26

POLICE25

POLICE26

POOL25

POOL26

Extract ID & Scenario will now only show the current scenarios & the new budget years scenarios in "Edit Scenario" the older scenarios are masked from this screen to make it easier to navigate

THERE ARE NINE (9) SCENARIOS FOR DEPARTMENTS TO SELECT FROM
Extract ID and Scenario must be selected in combination as listed below

Extract ID:	Scenario:
12FAC26	12_MO_FACULTY_26
9FAC26	9_MO_FACULTY_26
HSTAFF26	HOUSESTAFF_26
RSTAFF26	REG STAFF_26
POOL26	POOLED_POSITIONS_26
CSTAFF26	CONTRACT_STAFF_26

UNION SCENARIOS

CWA26	CWA_BARG_UNIT_26
POLICE26	POLICE_BARG_UNIT_26
USUNM26	USUNM_BARG_UNIT_26

THERE ARE TWO FILTER CRITERIA:
BY POSITION ATTRIBUTES (WILL SELECT ALL POSITIONS) – DEFAULT OPTION
BY EMPLOYEE NAME (WILL SELECT ONE EMPLOYEE AT A TIME)

CLICK ON SELECT BUTTON AT BOTTOM OF SCREEN

Salary Planner – Highlights cont.

Search

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

Update of Budget Development

Chart of Account: U
Budget ID: BUD26
Budget Phase: ADOPTD

RSTAFF26, REG STAFF 26

Organizations:
007A - HSC Clinical Contracting
013A - Continuing Medical Educ Department

Include Subordinate Organizations:

Employee Class:
SE - Exempt Staff
SN - Non-Exempt Staff

Bargaining Unit:
None

Faculty Rank:
None

Include Pooled Positions:

Include Vacant Positions:

Number of Records per Page:

Select which Organization number you would like to see or choose all. (You will only see Orgs. that you have access.)

Employee Classes for Org. selected will show. Select all to see all the Employee Classes listed.

You may select 25, 50 or 100 records to view all at once.

Salary Planner – Highlights cont.

Job Labor Distribution

Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

Name and ID:
 Position-Suffix and Title:
 EPAE Transaction #:

Verify that the account code on the Position & Job are the same!

Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	253001	3U0044	253B	2060	P121	GNACTV				15.00	8,907.71
U	013000	3U0044	013B	2060	P121	GNACTV				34.83	20,683.69
U	253009	3U0044	253D	2060	P121	GNACTV				50.17	29,793.31
Total										100.00	59,384.71

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Del
U	253001	3U0044	253B	2060	P121	GNACTV				15.00	8,907.71	X
U	013000	3U0044	013B	2060	P121	GNACTV				34.83	20,683.69	X
U	253009	3U0044	253D	2060	P121	GNACTV				50.17	29,793.31	X
Total										100.00	59,384.71	

Add New Record

Proposed Position Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
U	013000	3U0044	013B	2060	P121	GNACTV				34.83	20,683.80
U	253001	3U0044	253B	2060	P121	GNACTV				15.00	8,907.75
U	253009	3U0044	253D	2060	P121	GNACTV				50.17	29,793.45
Total										100.00	59,385.00

Save Copy Position Distribution to Job Copy Job Distribution to Position

All Labor Distributions on both the job and the position must equal 100%. Note: When you update an index or use a new index it must be a valid FY26 index. If not, the nightly refresh process will drop that index. The last refresh will be the night of April 2nd.

Salary Planner Information

Staff Salary Increases

- Overall information on the Budget Planner/Development processes can be found at <https://budgetoffice.unm.edu/budget/index.html>
- The FY26 Master Salary Planner Guidelines will be published in March 2025, following the Board of Regents Meeting, at <hr.unm.edu/mass-salary-update>
- Questions can be addressed to your HR Consultant - To locate the name of your HR Consultant, visit the following website: lobowebapp.unm.edu/apex_ods/f?p=145:1

Salary Planner Information

Contract Staff

- All fiscal year contracts generated last year that included the new auto-renew provision (majority) are scheduled to automatically renew every year on July 1, provided that a non-renewal is not being pursued by the department through their HR Consultant.
- In February, all HR Agents were provided a list of their:
 - contract staff up for auto-renewal,
 - any multi-year contract staff whose contracts are up for renegotiation, and
 - a list of any staff whose contracts are up for renewal that are not on auto-renew or in an executive position with a multi-year agreement (rare).
- For any renegotiated contracts, please ensure that all signed original contract revisions, exceptions and extensions are received by HR Client Services **no later than June 1** to ensure timely processing for the July pay period.

Salary Planner Information

Bargaining Unit Staff

- HR will coordinate the application of any salary modifications that may or may not result from the bargaining negotiations.
- Departments are not required to initiate documentation in these cases.
- Jobs covered under a bargaining agreement will be updated by HR and should not be updated by the departments.
- However, you should continue to budget your bargaining unit positions only, in Salary Planner.

Salary Planner Information

On Call and Term Positions

- On Call
 - Do not move OC positions outside the specified org
 - Budget on the position
- Term Appointments
 - Regardless if the job is extended past June 30th it will load in Salary Planner. This will allow departments to work on the job and the position in Salary Planner
 - Departments with employees who are on term appointments ending on or before June 30th and whose terms will not be extended, must submit a separation EPAF along with the appropriate documentation.

Salary Planner Information

Eligible Employees on Unpaid Leave Status

- Do not process changes to employees' jobs who are on unpaid leave status (FML, Personal and Medical Leave Without Pay, etc.) in Salary Planner.
- However, you should budget the position salary for that employee.
- Departments should submit an ePAN for the appropriate salary adjustment upon return from leave.

Salary Planner Information

Employee Payment Finance

Search Go

RETURN TO MENU SITE MAP HELP

List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

Mass Apply

[Jump to Bottom](#)

013B Continuing Med Educ Gen Admin, ~~Locked, Updateable~~

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals							
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Job Salary	Extract Status	Excluded from Totals
	S09333 - 00 Coord, Education Support	100.00	36,420.80	100.00	100.00	36,420.80	.00	.00	36,420.80		
	S04847 - 00 Program Manager	100.00	57,607.03	100.00	100.00	56,201.98	2.50	1,405.05	57,607.03	Changed	
Total:						92,622.78	1.52	1,405.05	94,027.83		

During the Salary Planner refresh period, if you process an action impacting the employee's salary, then you must update the changes in Salary Planner as well.



Salary Planner Information



Back to Employee Life Tab

LoboMail UNM Learn Calendar Groups Logout Help

Employee Payment Finance

Search Go

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#)

List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding applies to mass change as well as individual employee changes.

Mass Change

Hourly or Salary:

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

Mass Apply

[Jump to Bottom](#)

013B Continuing Med Educ Gen Admin, Locked, Updateable

ID and Name	Position, Suffix and Title	Employee Totals		Department Totals		Base Salary	Change Percent	Change Amount	Proposed Job Salary	Extract Status	Excluded from Totals
		Appointment Percent	Salary	Base Appointment Percent	Proposed Appointment Percent						
	S09333 - 00 Coord, Education Support	100.00	36,420.80	100.00	100.00	36,420.80	<input type="text" value="-100.00"/>	<input type="text" value="-36420.80"/>	<input type="text" value="0.00"/>		
	S04847 - 00 Program Manager	100.00	57,607.03	100.00	100.00	56,201.98	<input type="text" value="2.50"/>	<input type="text" value="1,405.05"/>	<input type="text" value="57,607.03"/>	Changed	
Total:						92,622.78	1.52	1,405.05	94,027.83		

If a job loads in Salary Planner and you know the employee will be separating prior to 7/1 and the separation paperwork is processed after the Salary Planner refresh, then you must zero out the job in Salary Planner. You can keep the budget on the position.



Office for Academic Personnel

Dr. Barbara Rodriguez
Senior Vice Provost



Main/Branch Campus Salary Increases

- Overall information on the Budget Planner/Development processes can be found at <https://budgetoffice.unm.edu/budget/index.html>
- The FY26 Master Salary Update (MSU) Guidelines should be published in April 2025 on the Office for Academic Personnel Website (OAP) at <https://oap.unm.edu/>
- Questions can be addressed to OAP at faculty@unm.edu or 505-277-4528.

Main/Branch Campus Bargaining Unit Faculty

- OAP will communicate and coordinate the application of any salary modifications that may or may not result from the bargaining negotiations.
- Academic Affairs FY26 Budget Guidelines will provide further instruction on budgeting for bargaining unit faculty. Academic Affairs FY26 Budget Guidelines should be posted in April 2025 at <https://budgetoffice.unm.edu/budget/index.html>

Research, Term Teacher, and Visiting Faculty Positions

- Research, Term Teacher, and visiting faculty positions will load in Salary Planner so department's can managing budgeting for the position.
 - For visiting positions, any updates to salary must follow the FY26 MSU Guidelines
 - For research and term teacher faculty positions, salary increases are subject to union negotiations
- Departments should submit the appropriate separation ePAF for positions ending on or before June 30, 2025. Visiting faculty who have completed their 3rd year in a visiting appointment, must be separated via end of contract/term ePAF.
- Extensions for research, term teacher, visiting faculty must follow the applicable extension process:
 - Research Faculty: Departments should submit an extension ePAF with the [Research Faculty and Post-Doctoral Fellow Extension Letter](#)
 - Term Teacher/Visiting Faculty: Departments should submit the [Renew Non-Continuing Faculty Appointment Request Form](#) along with the applicable appointment letter through the [Transaction Portal](#).

Special Administrative Components

Ongoing SAC's

- Any special administrative components (SACs) for faculty performing administrative duties which will continue in 2025-2026 should be included in Salary Planner.

New SAC's

- New SACs for 2025-2026 should not be applied in Salary Planner; however, the SAC should be budgeted in Budget Planner. Refer to the Academic Affairs FY26 Budget Guidelines for guidance. To initiate a new SAC, the department must submit the [Special Administrative Appointment SAC Request Form](#) to OAP through the [Transaction Portal](#) located on the OAP website.

Ending a SAC

- For SAC's ending on or before June 30, 2025, enter an amount of zero in the salary for the SAC job record. To terminate a SAC, departments submit complete [Special Administrative Appointment SAC Request Form](#) and submit the SAC End ePAF.

Academic Administrators

- Administrative appointments that impact bargaining unit status (Chairperson, Director, Associate Dean) must follow OAP's requirement for ending/initiating an administrative appointment. Departments should follow [OAP requirements](#) for initiating/ending an administrative appointment

Leave without Pay & Additional Compensation

Leave Without Pay (LWOP)

- For faculty members going on LWOP, enter zero. This amount will not be encumbered against your department index.
- Put a comment stating the faculty is on LWOP.

Additional Compensation

- Refer to the Academic Affairs FY26 Budget Guidelines for guidance on budgeting promotional increases, teaching overloads, extra compensation or other types of additional funds to be paid to faculty.

Budget Planner

For critical deadlines, please refer to OPBA
Website

<http://budgetoffice.unm.edu/budget/index.html>

UNM Budget Development Calendar

Budget Planner

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