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 on June 30, 2024.
- 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, 2024 and closes on January 22, 2024 at 5 pm.
Mid-year Reviews: What are they?

Presentation of expected June 30, 2024 actuals to your VP Unit and/or Office of Planning, Budget & Analysis

Presentation should include:

- Projected ending balances on June 30, 2024
- 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, 2023, *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, 2023 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 FY24 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/
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
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The End