Frequently Asked Questions (FAQs)

The Budget Prep Training PowerPoint contains step-by-step instructions on how to prepare your Original Budget. Below are some frequently asked questions and answers:

• How will the Budget Prep process work this year?

When the Budget Prep system is opened for the university, all initial extracts and processes have been run. Revenue will have been entered as well. We recommend that you run an initial Aggregate Detail to get a snapshot of your starting point. Please see the Budget Prep Training PowerPoint on how to run the Aggregate Detail.

This year, you will have view-only access to your departments. You will also have the ability to run specific schedules and queries. Any changes you need made must be communicated to the Office of Budget Services.

To help with Personal Service changes, we will be sending an Initial Worksheet which lists all employees homed in your department. Included on this worksheet is position number, position description, pay group, FTE, and employees' current salaries. You will need to indicate any salary changes on this worksheet. If you need to change salary distributions (e.g. how someone's salary is charged), we have designed a template to help capture this information. Similarly, we have developed a Non-Personal Services change template for travel, supplies, and equipment. All completed worksheets must be sent to budget@augusta.edu **no later than Friday, March 30**. Early submissions are encouraged.

Once the completed worksheets have been received by the Office of Budget Services, we will enter the requested changes. Then we will run all processes and another Aggregate Detail to get an updated snapshot of your budget. Ultimately, Campus Units must balance to the funds as shown on their Allocation Sheet. We will work with Campus Units to ensure their budgets are balanced.

• How should I handle vacant positions?

If you have a vacant position that you plan to fill, then you must budget the salary and fringes. The salary should be budgeted for at least the full base amount for the position. Do not set up the budget for just a few dollars since this will result in inaccurate data for your area as well as the university.

If you have a vacant position that you do ***not*** plan to fill, indicate this in the Active Status column on the Initial Worksheet that is sent to you. The position must be vacant as of 7/1/2018. Also, make sure the Proposed Budget is $0 by entering the current salary as a negative in the Other Adjustment column. There is also a column for any comments that may provide clarity. Positions that are inactivated during Budget Prep may be reactivated during the year by: 1) submitting a Position Classification Form to Compensation & Performance Management and 2) providing the Office of Budget Services with identified funding for the position.

• What is a LUMPSM position?

Positions with multi-incumbents will use the applicable position number. However, within the Budget Prep system, the emplid will be shown as LUMPSM. The criteria for a position to appear with an emplid of LUMPSM is that the position has one or both of the following:

- Has a maximum headcount greater than 1
- Is not eligible for benefits

• I have a position in which the salary is split with another department. How do I handle this?

If a position is split between your department and another department, communication is needed between departments to ensure the distribution is correct and that each department is balanced to their budget. It is imperative that departments work together.

• HR has informed me that a reclass, promotion, or new position that I sent over has been completed in HRMS. How do I pull that information into my budget prep?

The initial HRMS Extract is run by the Office of Budget Services before the Budget Prep System is opened. Information that has been keyed into Human Resources **after** Budget Prep has started must be extracted so that it is included in your budget.

• What if I need help in the Budget Prep System or have questions?

Contact the Office of Budget Services if guidance is needed.

• How do I complete my budget if my area is a shared service?

If your department is in a shared service area, contact Marlo Key (University's Office of Budget Services) and Jennifer Coursey (Hospital Budget) to review your data. The use of a spreadsheet template can aid in determining how (and what amounts) to enter into both of the budget systems. It is imperative to ensure the budgets are established correctly for both entities.

• What schedules/reports do I need to turn in with my budget?

For each of your department(s), the following balanced documents must be submitted electronically to the Office of Budget Services via BUDGET@augusta.edu email:

- **Signed** Coversheet
- Schedule G (pdf version)
- Schedule G-1 (pdf version)
- Declining % Report (pdf version)
- HR-Approved documentation for all Other Adjustments on filled positions
- For Shared Service areas, you must also submit a completed template or worksheet detailing how you calculated your budget.

• What is the deadline for submitting my worksheets?

The deadline to submit your changes to the Office of Budget Services is **Friday, March 30.** NOTE: Internal deadlines may be set by each area to ensure the budget deadlines are met. Check with Budget Managers in your area for any internal deadlines.

• What if I cannot meet the published due dates?

Please see our website for the Budget Prep Development Calendar. While we understand that emergencies may arise and technical problems may occur, the deadlines that have been set have been carefully analyzed to ensure that the Office of Budget Services has time to run and balance reports and ensure an accurate budget is submitted to the Board of Regents. **The Board of Regents deadline MUST be met.** Therefore, the Office of Budget Services cannot grant an extension to the published deadlines.