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?

The Budget Prep system will open to the University on Monday, March 18, 2019. The data in the system is from the extract of information from PeopleSoft HCM on Thursday, March 7, 2019. Respective revenue will have been entered for each unit. It is recommended that users 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.

Users will have view-only access to respective departments. They will also have the ability to run specific schedules and queries. Any changes needed should be communicated to the Office of Budget Services.

To help with Personal Service changes, the Office of Budget Services will send a Budget Prep Salary Worksheet on Monday, March 18, 2019 listing all employees <u>homed</u> in your department. Included on this worksheet is position number, position description, job code, pay group, FTE, employee ID and name, and employees' current salaries. Merit and other salary adjustments should be entered on this worksheet. Please note that merit should be entered as a percentage. Please refer to the Salary Administration Guidelines for further information regarding merit.

The Personal Service Distribution Changes Template is a separate form to capture distribution changes that may be needed. The Office of Budget Services has developed a separate 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 29, 2019**==. Early submissions are appreciated.

The Office of Budget Services will enter the changes from the worksheets submitted. The Office of Budget Services will assist departments with balancing to the allocation(s) provided. A helpful tool is to run an Aggregate Detail report to assess where the budget is in comparison to the allocation provided.

How should I handle vacant positions?

If a department has a vacant position that they plan to fill, a budget including both salary and fringes should be established. The salary should be budgeted for at least the full base amount for the position. Please be mindful that setting up inaccurate budgets (for example a position with a salary of $5) 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 Budget Prep Salary Worksheet. The position must be vacant as of July 1, 2019. For such positions, please enter the Proposed Budget as $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 Employee ID (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:

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

I have a position for 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 HCM. How do I pull that information into my Budget Prep?

The initial HCM 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 communicated to the Office of Budget Services 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 via email at BUDGET@augusta.edu or call your assigned analyst. We are here to help!

How do I complete my budget if my area is a Shared Service?

For Shared Service areas, a separate worksheet will be sent to you. This worksheet will help determine how (and what amounts) to enter into both of the budget systems. This worksheet will be pre-populated with data as initially shown in the Budget Prep system. Any changes made within the Budget Prep system must be captured on the worksheet. It is imperative to ensure the budgets are established correctly for both entities. Please contact Marlo Key (University's Office of Budget Services) and Jennifer Coursey (Hospital Budget) with any questions.

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:

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

What is the deadline for submitting my worksheets?

The deadline to submit changes to the Office of Budget Services is <mark>**Friday, March 29, 2019.**</mark> 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 a materially correct budget is submitted to the Board of Regents. The Board of Regents deadline must be met in order for the BOR to approve our University's budget at the May board meeting.