

# FY2025 ANNUAL PLANNING GUIDELINES

## BUDGETS ARE DUE

- Monday, June 10, 2024, at 8:00 am
- If done prior to the June 10 deadline, email [Cindy Fetsch](#) for review.

## BUDGET MODULE INSTRUCTIONS

- Detailed instructions are available on the Resource Planning & Allocation [website](#).
- A current list of department fund numbers can also be found on the Resource Planning & Allocation [website](#).

## BUDGET MODULE DATA WILL POPULATE PBCS

- Upon completion of entry to Budget Module data will be imported into PBCS for FY2025. Manual entry (by Resource Planning & Allocation staff) into PBCS will be limited to Grants & Contracts revenue and operating expenses.
- Upon completion of entry to Budget Module and budget approved by Chancellor the uploaded information will be sent out by RPA for verification including the following:
  - Appropriated Target Review
  - Transfers In & Out
  - Non-Appropriated Funds Balanced
  - Taxable Revenue and Part Fee
  - Service Unit Allocations

## PREMIUM SERVICES, excluding OPM Premium Services Fund 30313

- Offered to specific customers that require different levels of service beyond the base services.
- Defined between departments in a signed Premium Service Agreement.
- Each department involved in the agreement needs to budget the revenue (**491000**) or expense (**721000**).
- Available fund numbers have been set up for Premium Services. The range is 31950 thru 31959.

## FUND BUDGETS

- **Review ALL funds!** Do not allow the same budget to roll over each year without reviewing!
- Departments are required to establish both revenue (except 30000-39999) and expenditure budgets on all funds.
- Budgets should be prepared for all funds in the following ranges within which you expect to incur expenditures, receive revenue, or process transfers during FY2025 (unless specified below).
  - 10000-29999 Local
    - **Please note the following for:**
      - 26XXX - Alumni Foundation funds
        - Please budget the amount you expect to receive for both revenue and expense.
        - Contact Alumni Foundation if you have questions on your projected balance.
        - Budget the revenue using account **478000** and budget the expense in proper expense account(s).
        - The revenue and expense budgets should net to zero.

- Departments should budget the portion of salary and fringes on the 26XXX fund(s) for the named educator following the intent of the UND Alumni Foundation fund.
      - Combo Codes have been established for 26XXXX funds that include a project number that ties to the UND Alumni Foundation Fund. If it is not showing up in the drop-down box in HRMS Budget module please contact Cindy Fetsch.
      - Please remember that all 26XXXX funds used for salary need to have a project number tied to the UND Alumni Foundation Fund.
- 30000-37999 Appropriated
- 50000-59999 Scholarships
- 70200-70299 Quasi-Endowment (departments will not budget these funds)
- 70500-70599 Endowment Funds (departments will not budget these funds)
- 79000-79999
  - UND endowments distribution funds
  - Restricted Funds reimbursed from Alumni Foundation Funds – **Please follow similar process as the 26XXX fund, however combo code does not have a project number.**
- Departments may choose to budget, yet are not required, for the following fund ranges:
  - 60000-69999 Loans
  - 80000-89999 Agency Funds
- If a budget is being prepared for funds that are small or have minimal activity, consider consolidating and inactivating funds.
  - How to inactivate a fund:
    - Verify the asset and liability account balances for the fund are zero by running a trial balance in PeopleSoft Finance or TIBCO (Information Builders). A trial balance in PeopleSoft Finance must be run with a blank department to 9999. Asset account numbers are 6-digit numbers that start with “1” and liability account numbers are 6-digit numbers that start with “2”.
    - Verify the fund is not being using in an active Campus Connection item type. In Campus Connection, using Query Viewer, run the NDU\_0086\_SF query to Excel. Run the query for a SetID of UND01, with a Starting Item Type of “000000000000”, and an Ending Item Type of “999999999999”. Filter the query results by the “Fund” Column (column G) and look for any active item types that use the fund you are requesting to inactive. If there are any active item types (item types that do **not** contain “DNU” in the description”) contact Mary Anderson to request that the item type be inactivated or changed to another funding source.
    - Email [Sharon Loiland](#) or [Laura Johnson](#) the fund number(s) and fund name(s) to inactivate the fund(s).

## **APPROPRIATED CARRY-FORWARD**

- **PRIMARY UNITS**
  - Please see attached list of general appropriation suggested fund numbers and carry-forward fund numbers (highlighted in yellow) per expense function.
  - If there is a need to budget anticipated FY24 carryforward in FY25, contact [Cindy Fetsch](#) to assist in setting up the funding.
    - Final carry-forward from FY2024 not budgeted in FY2025 will be available after fiscal year end close and reconciliation.

- If orders were placed in FY2024 using carry-forward funds yet have been informed that items will not be received until FY25, contact Cindy Fetsch to assist with setting up the budget. It is crucial to set up the correct account numbers, depending on if the invoice is using operating (52XXXX-678999) or equipment (69XXXX) to not disrupt processing in UND Marketplace.

### **HR PERSONNEL BUDGETING (Job Data and DBT)**

- All active positions are listed in the Budget Module.
- All permanent Job Data changes are reflected in the Budget Module.
  - The following changes **cannot** be entered in the Budget Module:
    - New hires
    - Terminations
    - Probationary increases
    - FTE changes
  - Submit the change as soon as possible to Human Resources, using the correct process.
- Review and update the Department Budget Table (DBT) for each position using the correct funding sources, including grants & contracts.
- Only budget for positions you intend to fill during FY2025.
- Inactivate positions no longer used or that do not have funding at this time.
  - To inactivate, submit a Position/Request Change Form to Human Resources.
  - In the future, these positions can be activated with Human Resources upon obtaining funding.
- **PLEASE DO NOT BUDGET CENTS ON POSITIONS**

### **SALARY INCREASES – Detailed HR Guidelines are attached.**

- Benefitted staff/faculty whose overall documented performance level meets the standards are eligible for a salary increase.
  - Each qualified employee will receive a 2% increase. This increase will be merit, market, or a combination of both.
  - A 2% pool will be available for additional merit or market above the 2%. If an employee is under 2% or over 6% approval is needed by their respective VP.
- Benefitted staff whose overall documented performance level does not meet standards are not eligible for **any** salary increase.
- For faculty, it is up to their Dean/Chair to assess if the evaluation does not meet expectations.

### **FACULTY PROMOTIONS**

- Approved Faculty promotions should be entered in the Promotion Column and additional dollars are not provided centrally for the promotions and are not part of the overall 4% salary calculation or 6% maximum.

### **HEALTH INSURANCE PREMIUM**

- Health Insurance Premium will continue at \$1,643.08.

### **FRINGE BENEFITS**

- Fringe benefits for *all funds* (excluding Grant and Contracts) are budgeted in the Budget Module under FIN Dept Budget Entry.
- The amount budgeted for fringe benefits should be reviewed and adjusted ***within your targeted departmental budget*** to take into consideration the adjusted salary levels and any differences based on your current staffing.

- Items to consider that fringes may increase-decrease
  - Years of Service will drive fringe benefits up or down dependent on new hire or longevity of employee
  - Workers Compensation
  - Spousal insurance differences
  - New employees hired at a lower annual rate would drive fringe benefit rate higher.
  - Vacation and Sick leave payouts.
- **PLESASE NOTE:** If increasing fringe benefit budget more than the overall targeted departmental budget, department will need to reallocate within their target budget to cover the increase in fringe line.
- The FY25 Benefits Calculator will be updated as soon as possible on the Human Resources [website](#).

## EVALUATIONS

- Evaluations consistent with current board and institutional policy must be on file.
- It is the responsibility of each department to make sure an evaluation is on file with the proper office. If an evaluation has not been completed, the employee and their supervisor are not eligible for a salary increase. Refer to the Salary Administration policy if you have questions.
- Human Resources tracks the completion of *staff* evaluations in HRMS.
- UND and Medical School benefited *staff* evaluations are retained in Human Resources.
- UND benefited *faculty* evaluations are retained in various offices. Contact the office of Vice President of Academic Affairs for further clarification.
- Medical School benefited *faculty* evaluations are retained in the Medical School Academic Affairs office.

## PROBATION

- Newly hired employees who have **not** completed their initial six-month probationary status by June 30, 2024, are not eligible to receive **any** additional salary increase.
- Upon completion of an employee's probation they may qualify for a probationary increase.
- Budget accordingly for the anticipated probationary increase, **as additional dollars will not be provided for this increase.**
- The probationary budget amount should be budgeted in the DBT in the actual position in the Budget Module.
  - Add a comment in the DBT to explain additional amount is for probationary increase.

## VACANT POSITIONS

- Carefully evaluate ALL vacant positions.
- For positions that are being vacated and a replacement will be hired – budget the dollars in the vacated position (not in a pool position).
- Vacant positions **must** have a 2% market increase and can go as high as 6% (market) without VP approval.
- Positions with no DBT (“not budgeted”, with zero dollars budgeted, no funding entered, funding removed for FY2024, etc.) in the Budget Module will not be uploaded.

**WORK STUDY FUNDING**

- A work-study position will have an Earn Code of H14, and two funding sources listed. For the work-study to be active there needs to be a combo code without an earnings code that is used as a “default funding source” if position runs out of work-study funds. Dollars or %’s can be used for the default funding line. This is not a new process, just a refresh for budget module users.
- Combo codes for Work-study (H14) will be updated centrally.

NEW WINDOW | HELP | PERSONALIZE

Name: \_\_\_\_\_ Empl ID POOL: \_\_\_\_\_ Empl Record: 0 Period: \_\_\_\_\_  
 Dept ID: 3180 UND01 Position Number: 00101123 Rate Code: \_\_\_\_\_  
 Description: Student LA (Hty) Type: \_\_\_\_\_  
 FY: 2024 Budget Unit: 230 Job Code: 885050 Comp Freq: \_\_\_\_\_

**Current Salary**      **Starting Budgeting Salary**       Elig for Legislative Incr  
 Current FTE: 0.00      Next FY FTE: 0.00      Position FTE: 0.00       Elig for Campus Incr

**Compensation Information**

Amount	Merit	Market	Other	Equity	Camp/Gen	Promotion	Legislative	Total
								0.00
Percentage								0.0000 %
Difference								<b>\$0.00</b>

Comment: \_\_\_\_\_

View Updates    Apply to DBT    Approve Job and DBT    Job Won't Match DBT    Reset DBT

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**Department Budget Information** Personalize | Find | View All | 1-3

Appt#	Not Bldg#	Position Nbr	*Combo Code	Earn Code	Seq Nbr	Dis%	Ded Over	Tax Over	Allow Oversp	Current FY Amt	Calc	Chg Pct	Chg Amt	NFY Total	Redirect Combo Cd	Comment	Source
1		00101123	U3171610600	H14	1	25.000											Orig DBT
2		00101123	U42205250UND00270170	H14	1	75.000									U3171610600		Orig DBT
3		00101123	U220831800		1				<input checked="" type="checkbox"/>	70,811.00				70,811.00			Orig DBT

**POSITIONS USING GRANTS & CONTRACTS FUNDING**

- Budget all positions that will use Grants & Contracts funding sources for FY2025.
  - Contact Grants & Contracts to set up new funding sources for FY2025.
  - Once set up, the funding sources will be available in the Budget Module.

**PERSONAL VEHICLE MILEAGE RATE**

- In accordance with state and UND travel policy, the personal vehicle mileage rate for 2024 has been updated to the current GSA level:
  - 67.0 cents per mile.
  - These changes have been applied to the e-reimbursement system for any travel occurring January 1st, 2024, or after. Travelers are reminded that the use of a vehicle other than State Fleet must be approved by the employee’s supervisor prior to travel.

**TELECOMMUNICATIONS OPERATING REDUCTION**

- Included in the targets will be a base amount that will need to be reduced in the operating line, account 602000. If this amount is incorrect, please notify Cindy Fetsch.

As always please feel free to contact Cindy Fetsch with any questions.

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