

# FY2025 BUDGET MODULE PREPARATION CHECKLIST

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## 1. BUDGET CONTACT RECIPIENTS

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- If there is anyone you would like added or removed from the Budget Contacts distribution list (see attached - Budget Contacts FY2025), please email their names to [Cynthia Fetsch](#). The distribution list is used throughout the Annual Budget process to disperse information.

## 2. BUDGET MODULE ACCESS

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- Sign-In to [HRMS](#) to check for Budget Module access
  - Use your IDM PeopleSoft sign-on and password  
Some individuals may have a secondary UserID
  - NavBar > ND HE Applications > Budgeting  
Will see **HR (Salary and DBT) Budgeting** and/or **FIN Budgeting** options
  - Recommended web browsers are Chrome and Mozilla Firefox
- Add or remove users to the Budget Module using the **Budget Module Access Request Form** attached to this email – (listing of access attached labeled Budget Module Access)
  - Return the request form to [Cynthia Fetsch](#) no later than Monday, February 12<sup>th</sup>.
  - Personnel budget access – check NDU\_D\_WBB\_HR (HRMS Staff Roles - green)
  - Operating budget access – check NDU\_D\_WBB\_Budget (Budget Staff Roles - purple)
  - Indicate the department number(s) on the spreadsheet

## 3. REVIEW THE “PREPARE FOR BUDGETS” REPORT TO VERIFY HR DATA

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- Run the **HE PREPARE FOR BUDGETS Report** in [HRMS](#)
  - NavBar > ND HE Applications > Budgeting > HE (Salary & DBT) Budgeting > HE Prepare for Budget
  - Budget Unit is **230** (SMHS is 232)  
Year is **2025**
  - Returns data that is currently in the Budget Module (Permanent changes only)
- Check the **Starting Budgeting Salary** for each position
  - This is the salary FY2025 increases will be calculated on
  - If incorrect, please contact HR to update salary
- Check the **Budget Status** for each position
  - Positions listed as “On Probation-Not Budgeable” are not eligible for any increase on July 1
  - If incorrect, please contact HR to verify probation date
- Combo Code** changes will be made within the Budget Module during Annual Budget

- **DBT Budget Amount**  
This amount may differ from the Starting Budgeting Salary amount if there are multiple Combo Codes or a change was made during the year. The dollar amount should be manually updated during Annual Budget within the Budget Module.
- **Distrb %**  
A percentage instead of a dollar amount may be listed if a Permanent change was made during the year. The percentage will need to be changed to a dollar amount during Annual Budget within the Budget Module.

#### 4. INACTIVATE FUNDS THAT ARE NO LONGER USED

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Before a fund can be inactivated:

- Verify the fund balance (asset account #'s (1XXXXXX) and liability account #'s (2XXXXXX) are zero by running a Trial Balance in [PeopleSoft Finance](#)
- Email [Sharon Loiland](#) the fund number(s) and fund name(s) to inactivate the fund(s)

#### 5. VACATE A POSITION

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- Follow the procedures in **Manager Self Service** to terminate the current employee
  - If applicable, follow the Reduction in Force policy/procedure
  - The change will be entered into HRMS and flow through into the Budget Module
  - Contact HR if you have questions

#### 6. INACTIVATE POSITIONS THAT WILL NOT BE USED IN FY2025

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- Submit a **Position Request/Change Form** to HR and list the reason for inactivation under "Additional Information."
  - The form will be entered into HRMS and flow through into the Budget Module
  - Contact HR if you have questions

#### 7. TEMPORARY SALARY ADJUSTMENTS

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In previous years, there has been an issue with employees that had a temporary salary adjustment and the salary increase calculated in the Budget Module. To prevent the situation from happening in FY2025, HR has provided instructions to make corrections.

- Review the **FY25 Employees with Temporary Salary Adjustment Instructions** document attached to this email for further details and an example from a previous year.
- If applicable, submit the appropriate **Job Data Change** forms for the position(s)
  - If you have questions concerning temporary salary adjustments, please contact [Heidi Gerszewski](#) at 777-4988

## 8. POSITION CHANGES OCCURRING AS OF 7/1/2024 OR BEFORE

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- Submit a **Position Request/Change Form** for any changes to HR
  - The changes need to be entered into HRMS to budget for these positions
  - Contact HR or [Cynthia Fetsch](#) to discuss any questions you may have

## 9. LOCAL FUND SUMMARY

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- Run the **Local Fund Summary** in [PeopleSoft Finance](#) to assist with Annual Budget
  - NavBar: ND HE Applications > GL > HE Local Fund Summary
- Are the funds listed correct? Do any need to be added or deleted?
- Email [Cynthia Fetsch](#) with funds that need to be added/deleted

## 10. BIENNIAL BUDGET SUMMARY

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- Run the **Biennial Budget Summary** in [PeopleSoft Finance](#) to assist with Annual Budget
  - NavBar: ND HE Applications > KK > HE Biennial Budget Summary

## 11. QUESTIONS?

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Cynthia Fetsch at [cynthia.fetsch@UND.edu](mailto:cynthia.fetsch@UND.edu) or 777-4156