

FY2022 ANNUAL PLANNING GUIDELINES

BUDGETS ARE DUE

- On Thursday, June 10, 2021 at 4:30 pm. The Budget Module closes on Friday, June 11.
- 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

- Budget Module data will be imported into PBCS for FY2022.
- Manual entry (by Resource Planning & Allocation staff) into PBCS will be limited to Grants & Contracts revenue and operating expenses.
- Verify that the upload is displaying your planned expenses and revenues correctly.

PREMIUM SERVICES

- Offered to specific customers that require different levels of service outside of the core 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)**.

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 FY2022.
 - 10000-29999 Local
 - 30000-39999 Appropriated
 - 50000-59999 Scholarships
 - 70000-79999 Endowments/Other Restricted
- Departments may also have
 - 30290-30994 SPEA-Self-Paced Enroll Anytime/PDE-Professional Development for Educators
 - 60000-69999 Loans
 - 80000-89999 Agency Funds
- Budget Alumni Foundation funds (26xxx) for 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.

- 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 fund balance (asset account #'s (1xxxxx) and liability account #'s (2xxxxx) 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).

APPROPRIATED CARRY-FORWARD

- **PRIMARY UNITS**
 - Funds within 31912 thru 31920 are set up for appropriated carry-forward for FY2021.
 - If the intent is to use remaining FY2021 carry-forward budget, contact [Cindy Fetsch](#) to assist in setting up the funding.
 - Actual carry-forward from FY2021 to FY2022 will not be available until mid-September, as year-end must close.
- **SERVICE UNITS**
 - Carry-forward requests for service units will not be entertained.
 - Contact [Cindy Fetsch](#) if a critical need for carry-forward exists.
 - For example: orders placed but not received, specifically funded projects that will not be completed at year end. These types of situations will be considered on a case to case basis.

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
 - All other Job Data 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 FY2022.
- 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.

SALARY INCREASES

Below are the FY2022 Annual Budget Guidelines for salary increases. Procedures established for UND are as follows:

- Benefitted staff whose overall documented performance level does not meet standards (receiving less than a "3" on any section of their annual evaluation) 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.
- Approved FY2022 legislative increases of \$100/month for occupied permanent employees has been uploaded in the Budget Module by NDUS. The \$100 is by month and prorated if position is less than 1 FTE.
- In addition, for occupied faculty positions at 9 months the legislative increase was uploaded at \$900. If the faculty member is full time, please enter the additional \$300 in the **OTHER** column – see below.

Compensation Information								Total
	Merit	Market	Other	Equity	Camp/Gen	Promotion	Legislative	
Amount	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	900.00	900.00
Percentage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1.0537	1.0537 %
			<input type="checkbox"/> Approved	Difference			900.00	\$86,309.00
Comment	<input type="text"/>							

- Merit increases for eligible employees are to be based on documented performance. A dollar amount that can be used for these increases will be included on your targets. Increases are not to be across the board.
- Approved Faculty promotions should be entered in the Promotion Column.

FRINGE BENEFITS

- Fringe benefits for *all funds* are budgeted in the Budget Module under FIN Dept Budget Entry.
- The amount budgeted for fringe benefits should be reviewed and adjusted *within your departmental budget* to take into consideration the adjusted salary levels and any differences based on your current staffing.
- The FY22 Benefits Calculator is on the Human Resources [website](#).

HEALTH INSURANCE PREMIUM

- Will increase to \$1,428.77 per month.
- Health insurance premiums are paid a month in advance.
 - Pay periods June 1-15, 2021 and June 16-30, 2021(both paid from FY2021) will be at the increased rate as they cover the July health insurance premium.

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, 2021, 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. This is a change from previous years.
 - 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).
- Positions with no DBT (“not budgeted”, with zero dollars budgeted, no funding entered, funding removed for FY2021, etc.) in the Budget Module will not be uploaded.

POSITIONS USING GRANTS & CONTRACTS FUNDING

- Budget all positions that will use Grants & Contracts funding sources for FY2022.
- Contact Grants & Contracts to set up new funding sources for FY2022.
 - Once set up, the funding sources will be available in the Budget Module.