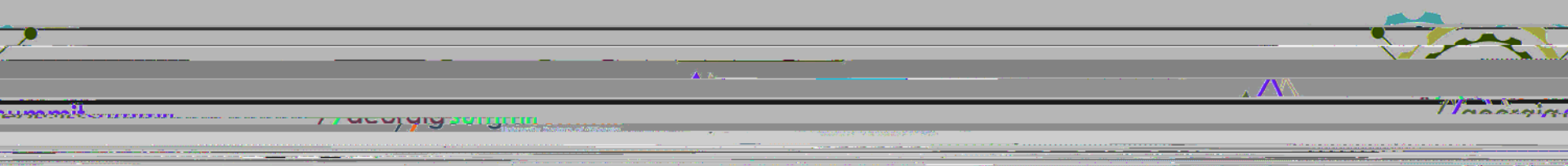


Budget Prep Redesign

Christy Todd
ITS



Agenda

- Background
- HCM Impacts on Budget Prep
- Updates and Changes within Budget Prep
- Timeline
- Next Steps
- Questions



Background

- Discussion of updating Budget Prep/designing a Budget Amendment system dates back to 2015
 - Budget Amendment Design session – November 2015
 - Presentation of Budget Amendment Design to Budget Issue Committee – January 2016
 - Budget Prep Design session – March 2016

HCM Impact on Budget Prep

- Data will stay in sync between HCM and PSFin systems through the use of Integration Broker
 - Chartfields (PSFin → HCM)
 - Fund, Class, Program, Account, Project
 - Payroll Distribution Codes (PSFin → HCM)
 - Job Data (HCM → PSFin)
 - Position Data (HCM → PSFin)
- Note – Departments do not flow between PSFin and HCM. Departments are manually added in both systems.

HCM Impact on Budget Prep

- Payroll Distribution Codes
 - Duplicate chartfield combinations will not be

HCM Impact on Budget Prep

- Data will be imported into Budget Prep from Job, Position, Benefits, and Department Budget tables in HCM
- Data will be exported from Budget Prep into Job, Position, and Department Budget tables
-

HCM Impact on Budget Prep

Department Budget Table in HCM

The screenshot displays the HCM software interface for a Department Budget Table. The interface includes a search bar, navigation controls, and a table with columns for Position Number, Effective Date, Eff Seq, Status, Date Entered, Funding End Date, Fiscal Year Budget Amount, Distribution %, Earnings Code, and Sequence.

Search and Navigation:

- Find | View All
- First 1 of 1 Last

Form Fields:

- Position Number: 10005418
- Care Consultant/Project Spec
- Effective Date: 07/01/2017
- Eff Seq: 0
- Status: Active
- Date Entered: 06/24/2017

Table Headers:

Position Number	Effective Date	Funding End Date	Fiscal Year Budget Amount	Distribution %	Earnings Code	Sequence
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HCM Impact on Budget Prep

- Use of Short Work Break and Return to Work rather than End Fulltime Appointment and Begin Fulltime Appointment for 10 month employees

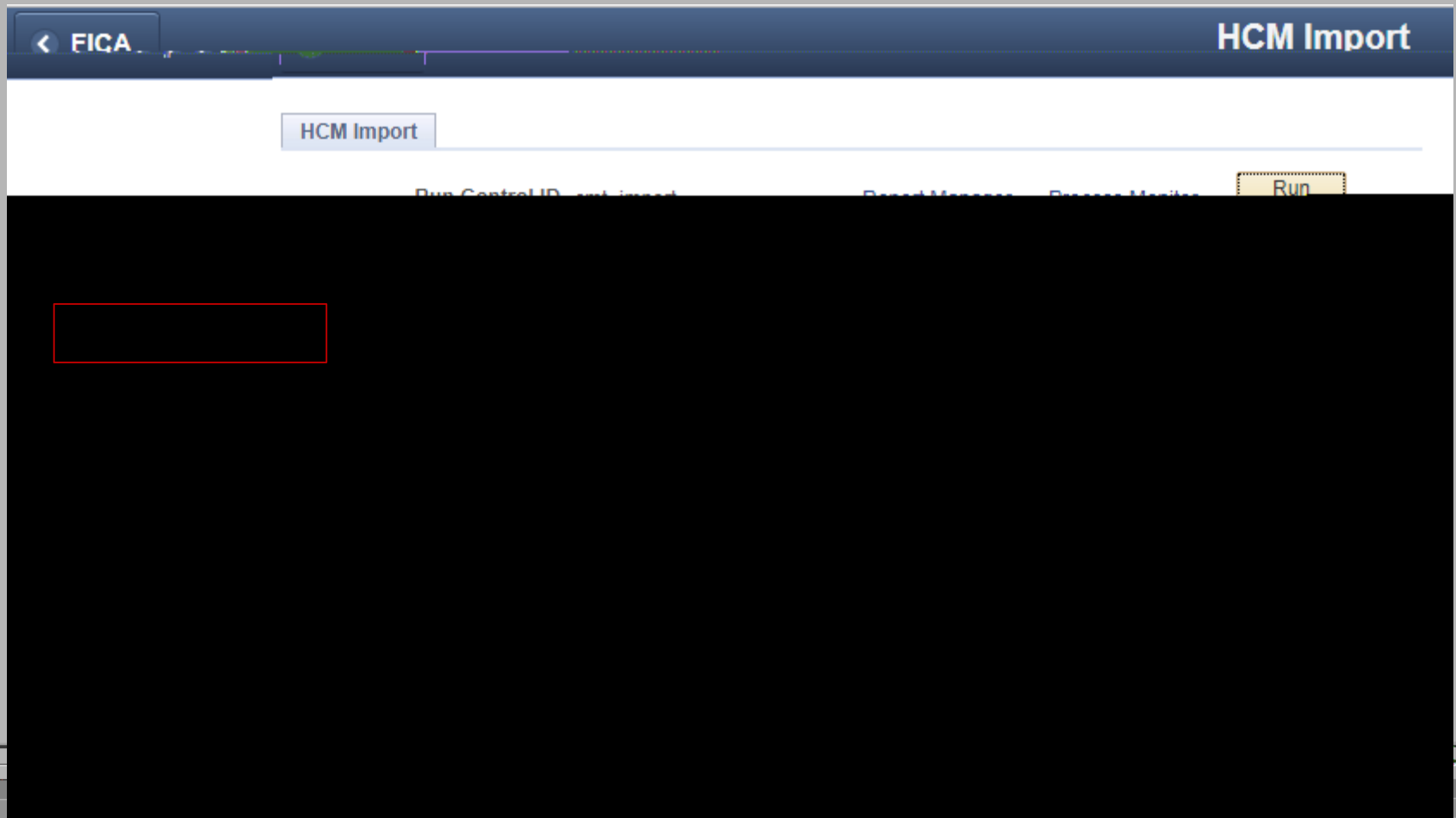
Updates and Changes within Budget Prep

Updates to Setup pages

The screenshot displays a software interface for managing Pay Groups. At the top, there are navigation tabs for 'Pay Groups' and 'Employee Services'. A 'Pay Groups' button is visible on the right side. Below this, the 'Business Unit' is set to '42000'. A table on the right lists pay groups with columns for 'Pay Group' and 'Description'. The table includes entries for 42A (Salaried), 42E (Exempt Hourly), 42F (10 Month Faculty), and 42G (Graduate Assistants). On the left, a larger table shows a list of pay groups with columns for 'Account', 'Calc Mode', 'Fica Rate', 'Life Ins', 'Faculty Future Rows', 'Summer Faculty', and 'Raise Date'. The table contains several rows, including 521100, 521100, 511100, 523100, 42L, 42M, 42N, 42P, and 42S. A large black redaction box covers the bottom portion of the interface.

Account	Calc Mode	Fica Rate	Life Ins	Faculty Future Rows	Summer Faculty	Raise Date	
521100	M2	Y	Y	N	N	07/01/2017	
521100	M2	Y	Y	N	N	07/01/2017	
511100	M1	Y	Y	Y	N	08/01/2017	
523100	M2	Y	Y	N	N	07/01/2017	
42L	Temporary Salaried	525100	M2	Y	N	N	07/01/2017
42M	Pending Faculty	M2	Y	N	N	N	07/01/2017
42N	Non-paid Affiliate	M2	Y	N	N	N	07/01/2017
42P	Part-Time Faculty	512100	M2	Y	N	NL	07/01/2017
42S	Summer Faculty	513100	M2	Y	N	Y	07/01/2017

Ability to Validate HR Import data



Ability to Validate HR Import data

Budget Brn_HCM_Import - Georgia Southwestern St Univ

DEPT	PAYGROUP	ANNUAL RATE	POSN	BUDGET	HEALTH	COVNG	ED	RETI	POSITION	EMPLID	EMPL-REL	EMPL-ACC	NAME	DEPTID	JOBID	
DISC	AMT												ACCOUNT	ACCT_CD		
0000	0000	1005.40	0000000000	0000000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000
			000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000	000000
													421016104464		2218.49	
													421016105469		7542.88	
													421016103047		12423.58	
													421016102142		22184.97	

Update Personal Services

< Process List Personal Services

Project New Distrib Old Distrib Priority Group Trngco

Version: CURRENT

ETE: 4.000000 Effective Date: 07/01/2017

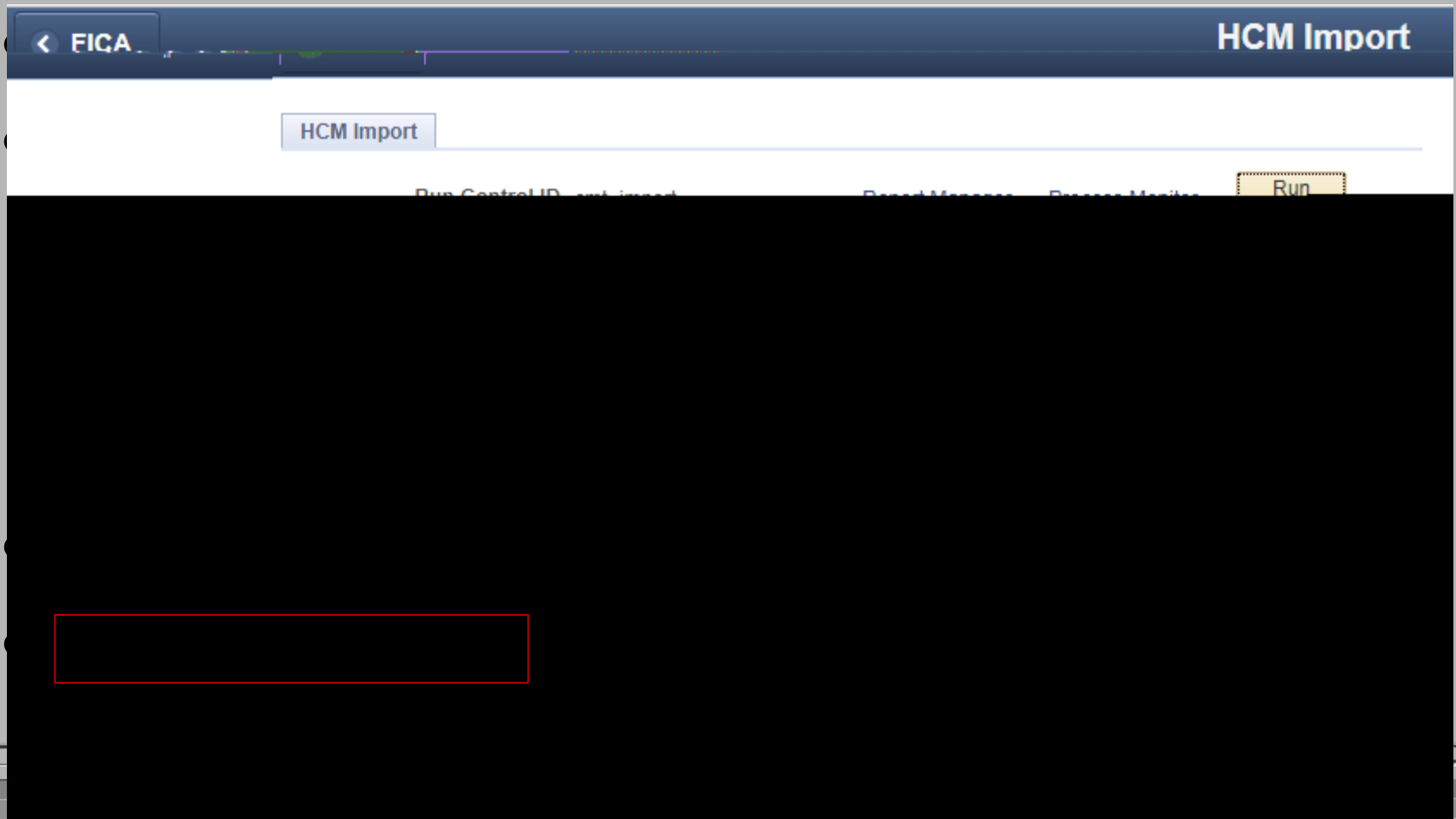
Department: 1300101 Dept Of Art Pay Group: 30H

Job Code: 510X07 Rcd#: 0

Update Personal Services

- Separate Reporting of Promotion and Equity
- Skip Job Export Flag
 - This indicates that Job Data insert for this position should be excluded from the export to HCM
 - Position Data row and Department Budget row would still be inserted
- Comments Box
- All data will be updated during subsequent extracts
 - Ability to import one position at a time

Update Personal Services



Update Personal Services

- Fringe page is included in the Update Personal Services page layout.
- Distribution Totals are shown on the New Distrib page

Distribution Totals on New Distrib

The screenshot displays the HCM Import Personal Services interface. At the top, there is a navigation bar with a back arrow and the text "HCM Import" on the left, and "Personal Services" on the right. Below this, a breadcrumb trail includes "Budget" and "New Distrib". The main content area shows a table with one row. The row contains a "Seq:" label followed by the value "1". Below the table, there are two labels: "Proposed Salary: 44,009.94" and "Proposed Budget: 44,009.94". On the right side of the interface, there is a label "Current Salary: 44,009.94". The bottom portion of the screenshot is obscured by a large black rectangle.

Seq:
1

Proposed Salary: 44,009.94 Proposed Budget: 44,009.94 Current Salary: 44,009.94

Fringe Update page

Additional Updates

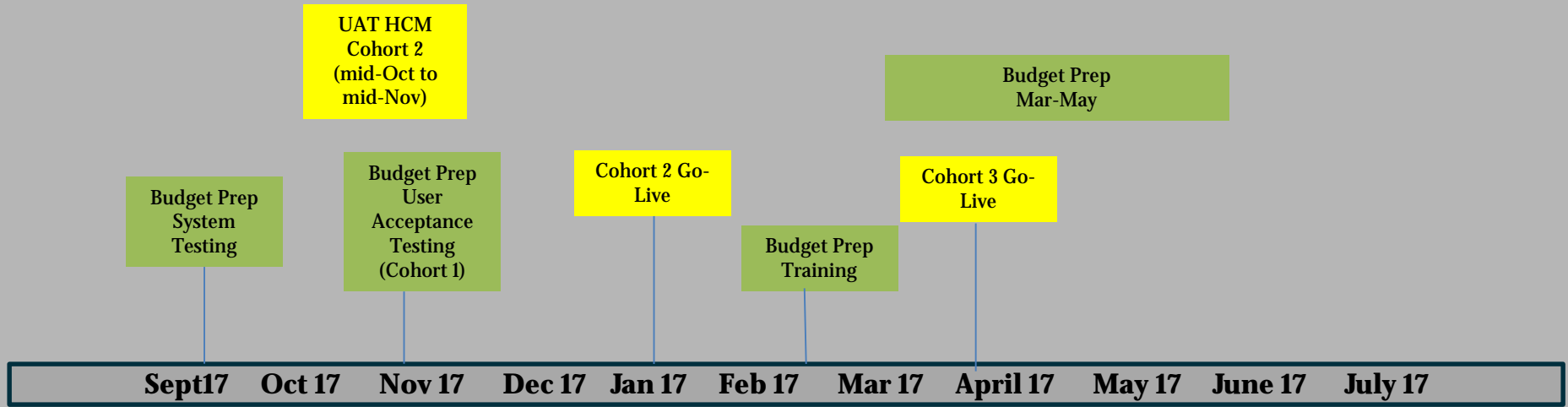
- Rapid data entry page for Merit increases
 - Future functionality – automated load
- Updated calculation of FTE
- Enhanced Reporting
 - Schedule G is being updated to provide information similar to the GIT Schedule G
 - Additional reports will be developed after the FY2019 Budget Development cycle is complete

Additional Updates

- Ability to validate data before exporting HR data into the HCM system
- Ability to create new fiscal year Grant budgets without the requirement of creating a zero dollar budget in the current year
- Personal Services Budget journals will include Position number and Employee Name



Timeline



Next Steps

- Budget Prep is currently in System Testing
- User Acceptance Testing for Cohort 1 institutions – early November 2017
- Budget Prep Training – late Feb/early March 2018
- Development begins for Budget Amendment System (January 2018)

Next Steps

- New Budget Amendment Functionality:
 - Plan to begin development following Budget Prep redesign system and user acceptance testing.
 - Goal is to deliver for institutional use beginning July 1, 2018 for FY2019 budgets.
 - Our first priority is support of OneUSG so this will be dependent on functional and technical resource availability.

Questions

