FY 2023
Phase II Budget

June 7, 2022
Agenda

• FY 2023 Phase II Budget Process

  • Introductions
  • Salary Guidelines
  • Overview
  • Reports
  • Agency Specific Information
  • Questions
  • Contacts
• **Merit**
  - Must meet criteria for merit
    - Hired or transferred from other system member by 3/1/2022
    - Six months or more since last merit
    - Have current performance evaluation on file in Workday
    - Must be “meets expectations” or higher rating
  - Add to base merit over 10% requires administrative approval prior to submission
  - Cap of $10,000 on one-time merit (Exceptions to this limit must be submitted for approval through appropriate administrative channels)
  - Enter **add to base** merit on your unit salary recommendation template for upload to PBA
  - Enter **one-time merit** on separate template (06) or column (07)
    - If funding one-time from multiple accounts add lines for each account
    - Total of all lines for one employee should total one-time payment
  - Submit salary recommendation template via email to budget@ag.tamu.edu (must cc unit/dept head indicating approval)
• Merit
College of Agriculture and Life Sciences (02 sources), Agrilife Research (06 sources) and Agrilife Extension (07 sources)
• 2% Merit plan
  • 2% *Add to base* (plus incremental benefits for 02 sources) will be *centrally funded* based on FY22 budget goldplate (Sept. 1, 2021) on:
    • College accounts that receive a central budget allocation (1xxxxx, 237xxx and 24xxxx)
    • Research and Extension appropriated accounts (state and federal)
  • All other add to base awards on non appropriated funds are unit funded and must be sustainable
  • One-time merit payments on non-appropriated funds must be both allowable and have available funding. One time payments to an individual may not exceed $10,000.
  • Add to base and one-time merit awards for faculty and staff should not exceed an aggregate average of the 2% merit plan.
Salary Guidelines

-Promotions and Reclassifications with effective dates up to 8/31/22:

• Submit Edit Position Restrictions no later than June 30.
• Once the Edit Position Restrictions is completely approved in Workday, submit the Change Job
• Both the Edit Position Restrictions process and the Job Change – Promotion-Reclassification process have to be completely routed and approved in Workday by 5 p.m. on Tuesday, July 26 and updated in the PBA
• Unit updates position/compensation in PBA to align with Workday
Salary Guidelines

-Promotions and Reclassifications with 9/1/22 effective dates:

  • All **job profile (title) changes** should be submitted in **Workday** by June 30-
  • Submit Edit Position Restrictions **first, then to change title and duties**, submit Change Job* in Workday
    *Change Job process:
    • **Do NOT** enter compensation change in section of job change-promotion in **Workday**- Submit compensation change on unit template. Please attach copy of signed approval with salary recommendation template.
    • **DO** click the arrow to restore compensation.
    • ***Hourly to monthly promotions – do NOT enter in the PBA or Merit grid- units will process manually in active workday after Sept. 1**
-Promotes, Reclassifications, Equity

- **Equity effective Sept. 1, 2022:**

  - Research (06) and Extension (07)-Units submit Equity adjustment requests via memo to Agrilife Human Resources for both faculty and staff no later than June 30.

  - College (02) requests-
    - Staff: Units submit Equity requests through HR to Dr. Patricia Klein.
    - Faculty: Units submit the “Faculty Equity Request Template” (from Unit head, through Dr. Patricia Klein to Dr. N. K. Anand, Vice President for Faculty Affairs) to coals-eadean-office@ag.tamu.edu. Please contact Alberta Ortiz-Ganem for template. Units must have sustainable funding sources for approved equity.

  - Submit compensation change on unit template. Please attach copy of signed approval. Submit to HR via Laserfiche folder - WIP-Human Resources
Salary guidelines

• SEP (Salary Enhancement Program)

  • Requests due via laserfische to Agrilife Human Resources (WIP-Human Resources) by 5pm- July 29, 2022 for routing and approval. Please use current AG 482 form (updated 10/10/19)

  • Sufficient funds to cover SEP and estimated benefits must be in accounts when SEP is submitted for approval
• Goals of Budget process
  • To update Workday for 9/1/22 compensation changes and costing allocations
  • To create FY23 Goldplate
  • To load FY23 E&G/R&G budgets in FAMIS
  • To generate 9/1/22 salary encumbrances in FAMIS
Overview

• Tools
  • Salary recommendation template-
    • Unit enters FY23 merit, equity and promote recommendations
    • Unit enters one-time request on separate one-time tab (for 06) or column (for 07)
    • Unit emails to budget@ag.tamu.edu no later than July 13
    • Budget office uploads to PBA
  • PBA (Position budgeting application)-
    • Unit access granted by adloc and Statement of Responsibility (SOR) form
    • Access under SSO menu
    • Unit updates costing allocations needed for 9/1/2022 goldplate
    • Approved salary changes will be fed to Workday Merit module.
    • Costing allocations will be fed to Workday.
  • Workday merit module- Centrally managed by budget office
    • Approved salary changes effective 9/1/2022 will be fed to Workday
Overview

• Steps
  • May 19-
    • Snapshot taken from Workday and loaded to PBA. Units track all changes (new hire, transfer, vacate, title changes, salary adjustments) made in active Workday after snapshot (reports provided starting June 3)
  • May 31-
    • PBA opens to units
  • June 7-
    • Salary recommendation template by adloc provided to units to enter 9/1/22 compensation changes (merit, equity, promote). **Units should not enter merit, equity or promote increases effective 9/1/22 directly into the PBA.**
Overview

• Steps (con’t)
  • June 17
    • 901 and fund blind reports begin (every Friday)
  • June 30 and July 26
    • Promotion and reclassification and equity deadlines
  • July 13
    • Submit salary recommendation template to Budget@ag.tamu.edu with Dept/Unit head approval (updates to submitted salary recommendation templates must have all current recommendations- not just changes, and must be approved by unit head) Budget office uploads unit templates to PBA.
  • July 27
    • PBA is closed to units
  • July 29
    • Final preliminary 901 and fund blind reports sent to units*ensure all submitted recommendations are accurate
• Steps (con’t)
  
  • Workday Merit Module
  
  • Merit module will be launched to Budget office (no tasks to units- no “scooping up”)
  
  • Budget office will review/reconcile PBA to WD Merit module
  
  • Merit module finalized by System August 2
Overview

- Results

- Costing allocations from PBA, effective 9/1/22, feed to Workday after the last FY22 biweekly payroll posting
- Salary changes from Merit module, effective 9/1/22, feed to Workday
- FAMIS budget is finalized and loaded to FAMIS
- Goldplate Budget reports are produced
Reports

• PBA to Workday report
  • Identifies discrepancies between active Workday and PBA.
  • Red highlighted data identifies discrepancies (vacate/new hire, salary/rate).

• Fund blind report by adloc (no sources)
  • Initial report reflects salaries from snapshot
  • Units will receive weekly to reflect salary changes as submitted in PBA
  • Last report reflects Goldplate salaries with all salary changes effective 9/1/22 (data from PBA)

• 901 Goldplate salary report by account
  • Reflects 9/1/22 salaries with cost allocations (data from PBA)
Agency Specific Information

• Extension
  • Federal Accounts
    • FY23 federal goldplate E&G accounts will end in “2”; ex: 175002
    • State/federal split on specialist salaries will be 65/35
    • Federal Smith Lever matching (support account is 49411) is the same percent as federal - 35%
    • Not all units will have federal funds

• Project zero accounts
  • Use for budgeting salaries that will be funded with one-time admin commitment
  • Use for budgeting salaries if C&G account not yet available
Agency Specific Information

• Extension Continued

• Coordinated Program Areas
  • CPA’s are continuing
  • Piloted effort tracking on salary support accounts
  • Removing for FY23
  • Costing allocations need to be removed
Agency Specific Information

• Research
  • Federal Accounts
    • Fringe benefits will **no longer** encumber on Federal accounts
    • Federal match for sourcing by project will be:
      • Hatch – 50% federal, 50% match
      • Hatch Multi-state – 48% federal, 52% match
      • McIntire Stennis- 50% federal, 50% match

• Project zero accounts
  • Use for budgeting salaries that will be funded with one-time admin commitment
  • Use for budgeting salaries if C&G account not yet available

• FY23 Budget presentation, PBA training and calendar will be posted to
  Administrative services –Fiscal-Budget website https://agrilifeas.tamu.edu/fiscal/fiscal-budgets/
Questions
Contacts

• College Contact
  Deanie Dudley, Assistant Dean 979-845-3748
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• Extension Contacts
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• Research Contact
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