FY25 Budget Office Open Forum 10/22/2024

Existing Reports to budget SWG1

UCI Division of Finance and Administration | With U • For U

Agenda

- Using existing reports to budget SWG1:

  1. Status Quo – continue using BDP & KFS Staffing. BDP tips

  2. Hybrid – using BDP & KFS Staffing with your Coordinating Point

  3. Org, Fund, SWG1 Consolidation – for units that opt not to maintain BDP & KFS Staffing there are existing reports to determine the SWG1 budget. Explore two recommended reports:

     - UC Path FTE Report

     - Job Distribution Report

Status Quo – Continue using BDP & KFS Staffing

- Reports: KFS Staffing List by Account or Org Hierarchy, BDP in Path

- Reminders and tips for units that have decided to continue to use BDP in Path and KBM Staffing to permanently budget at the SWG1 position level

- Instances where BDP should be created include:

  ➢ New career staff positions to be made permanent

  ➢ Permanent positions that have moved depts

Status Quo – Continue using BDP & KFS Staffing

- Instances where BDP should be updated include:

  ➢ Dissolving/Inactivating vacant positions – STF box should be unchecked:

  ➢ Vacant positions: the system automatically downgrades to the minimum of the title code. If a unit wants to reflect a permanent salary that is higher, then the Adjustment Amount field in BDP needs to be added for the difference. For SWG1, this is the only time that the Adjustment Amount field should be used

Status Quo – Continue using BDP & KFS Staffing

➢ Resolving PPMEs: Incorrect SWGs or earn codes will need to be updated. Or the STF needs to be unchecked if the Employee Class is not considered to be permanent (e.g. Empl Class 5, Student)

- BDP does not need to be updated when salary increases occur. The program always takes the latest annual compensation in Path and uses the BDP FTE + the Adjustment Amount field (if any amount is entered) for its calculation

- KBM Base Budget & Staffing guideline on the Budget office website for units that still want to make updates to BDP from page 6-10: https://www.budgetoffice.uci.edu/base-budgeting/index.php

Hybrid – BDP, KFS Staffing w/Coordinating Pt

- Reports: KFS Staffing List by Account or Org Hierarchy, BDP in Path, Base Budget Fund Summary

- Instead of budgeting SWG1 salaries on the position number, units can use the KFS Staffing report and address variances at the consolidation level on their Coordinating accounts by fund

- For example: KFS Staffing for UC19900 has 6 positions that have base budget variances. Instead of issuing a BAT to adjust the SWG1 budget on each position#, the BAT can reflect the total sum of the variances at $10K (entering one line on the To/Increase side) on SWG1 and can be reflected on the unit's coordinating point

Acct#	Position#	Perm Budget Variance	Fund
GF11122	40308503	-2,200	19900
GF13456	40309258	-1,500	19900
GF11215	40316460	-2,000	19900
GF13456	40329013	-1,300	19900
GF11215	40317126	-2,000	19900
GF13456	40320668	-1,000	19900
Total Variances		**-10,000**	

Unit's Coordinating Pt

GF10235

BAT: To/Increase SWG1 of $10K to Coordinating Pt in fund 19900 w/no pos#

Hybrid – BDP, KFS Staffing w/Coordinating Pt

- Same as how the permanent Benefits budget might be held at the unit's coordinating point; the coordinating point can serve as the repository for SWG1 increases and decreases

- This method works best if the coordinating point contains a positive unallocated budget from which to fund from

- Because coordinating points cannot have any expenses, this method might require units to allocate current year budgets to their dept accounts so that they are not in deficit at fiscal close (similar to how units might fund benefits to their dept accts at year end)

- Overall, the SWG1 base budget is still being adjusted and is representative of a unit's recurring obligations by fund
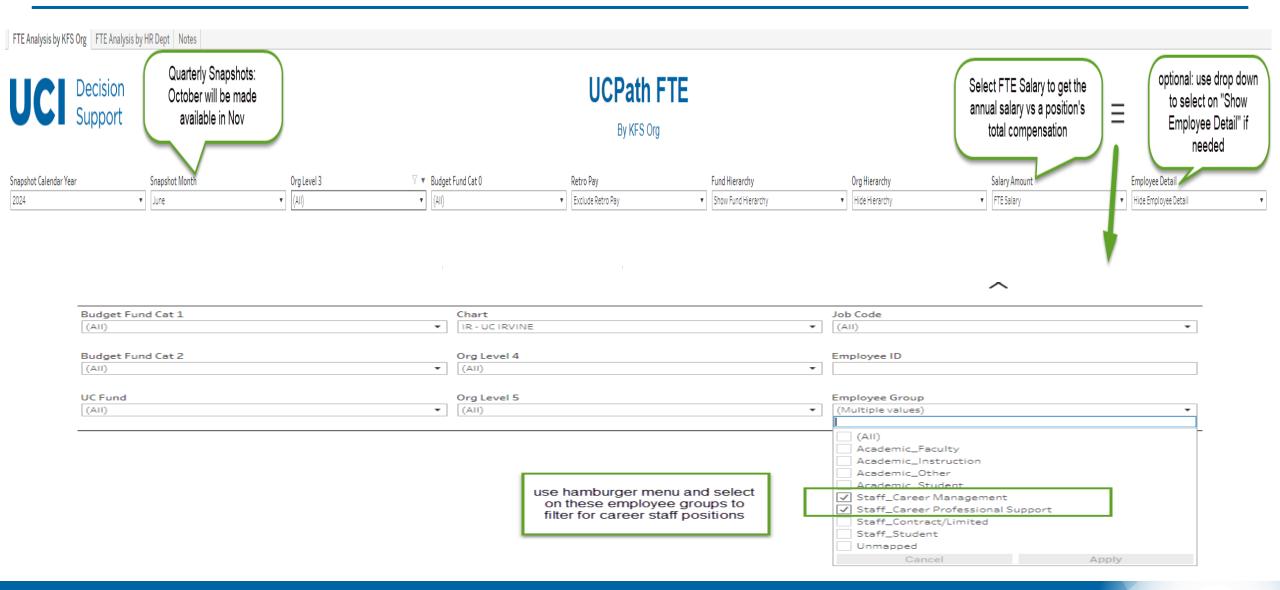
Org, Fund, SWG1 Consolidation – UCPath FTE

- Reports: UCPath FTE Dashboard, Base Budget Fund Summary

- Units who do not want to maintain BDP in Path or use the KFS Staffing report, will need another way to determine what their SWG1 obligations are to know how much to budget their recurring career staff salaries

UCPath Decision Support

Report Status

Decision Support Data Loading

UCPath Report Overview Recording

UCPath Report "Quick Guide"
** As of 5/19/2023 **

UCPath Tableau Help Guide

UCPath Report Google Group

UCPath DOPE vs KFS Reconciliation Tips Presentation

⊞ Absence

⊞ Benefit

⊟ Budget/FTE

Budget Distribution Report (RUCI140)

UCPath Budget Summary Report (RUCI144)
** Central Office Only **

UCPath FTE Dashboard (RUCI283)

Org, Fund, SWG1 Consolidation – UCPath FTE

- DEMO

- Notes: (visual on next slide for the bullets below)

  - Quarterly snapshots: October 2024 should be made available in mid-Nov

  - On hamburger menu, go to Employee Group and select only: Staff_Career Management & Staff_Career Professional Support

  - Change Salary Amount to "FTE Salary"

  - Employee info is available if needed by clicking on "Show Employee Detail"

  - Expand on Core vs Non Core header by clicking on the + sign and keep expanding until reaching the UC Fund column

  - This report does not show funding information

- Compare to Base Budget Fund Summary:

  - The Annual Salary total on the UCPath FTE report should be compared to the Base Budget Fund Summary filtered on SWG1 and SWG2 by fund and the amount can be under budgeted by 5%-10% depending on the size of the unit

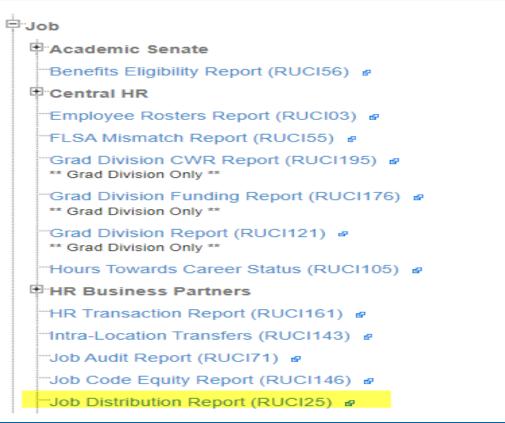 - Budget adjustments to be made on coordinating accounts by fund as needed

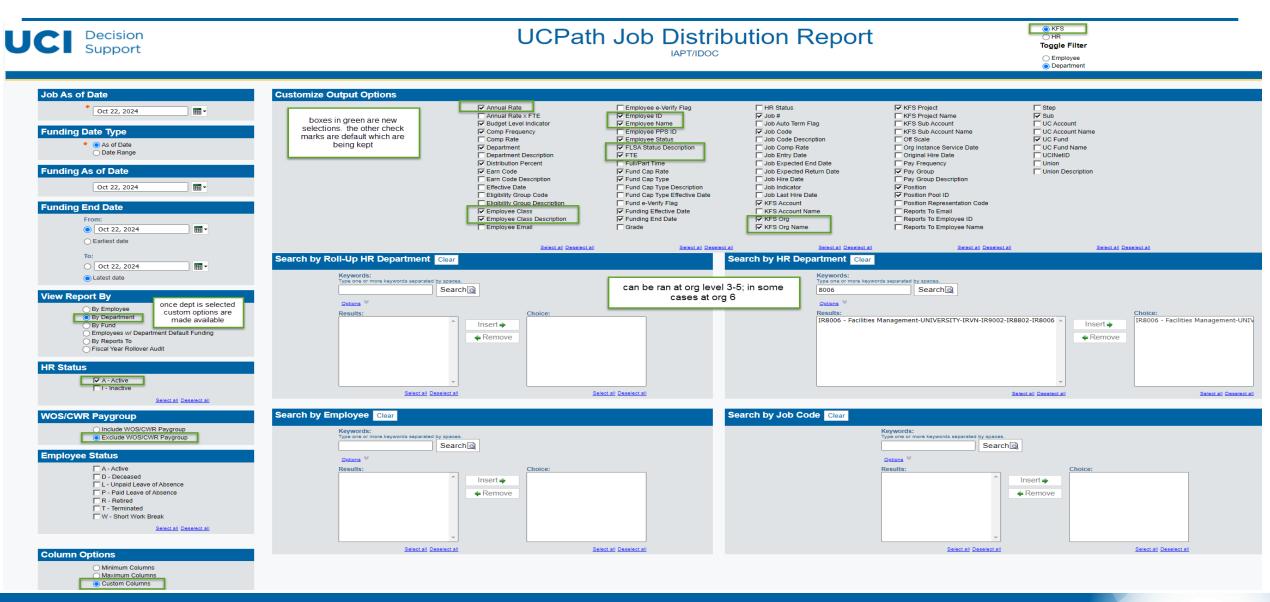# Org, Fund, SWG1 Consolidation – UCPath FTE

Org, Fund, SWG1 Consolidation – Job Distribution

- Reports: Job Distribution, Base Budget Fund Summary

- Another report option is: Job Distribution Report in UCPath Decision Support. This allows users to see more details such as funding information

UCPath Decision Support

- Job
  - Academic Senate
  - Benefits Eligibility Report (RUCI56)
  - Central HR
  - Employee Rosters Report (RUCI03)
  - FLSA Mismatch Report (RUCI55)
  - Grad Division CWR Report (RUCI195)
    ** Grad Division Only **
  - Grad Division Funding Report (RUCI176)
    ** Grad Division Only **
  - Grad Division Report (RUCI121)
    ** Grad Division Only **
  - Hours Towards Career Status (RUCI105)
  - HR Business Partners
  - HR Transaction Report (RUCI161)
  - Intra-Location Transfers (RUCI143)
  - Job Audit Report (RUCI71)
  - Job Code Equity Report (RUCI146)
  - Job Distribution Report (RUCI25)

Org, Fund, SWG1 Consolidation – Job Distribution

Org, Fund, SWG1 Consolidation – Job Distribution

- Since this info is taken from the Funding page in UCPath, there is a need to eliminate duplicates for the multiple earn codes and calculate annual costs by distribution % & FTE by position

- DEMO

- Once downloaded as excel:

  - To eliminate duplicates, filter Earn code for blanks

  - Add a column to calculate Annual salary by distribution % & FTE

  - Optional: add another column to calculate CBR based on FLSA Status

  - Create pivot by KFS sub, org and fund

- Notes:

  - Compare Job Distribution to Base Budget Fund Summary and make base adjustments as needed

  - If the report times out – please try again

Questions?