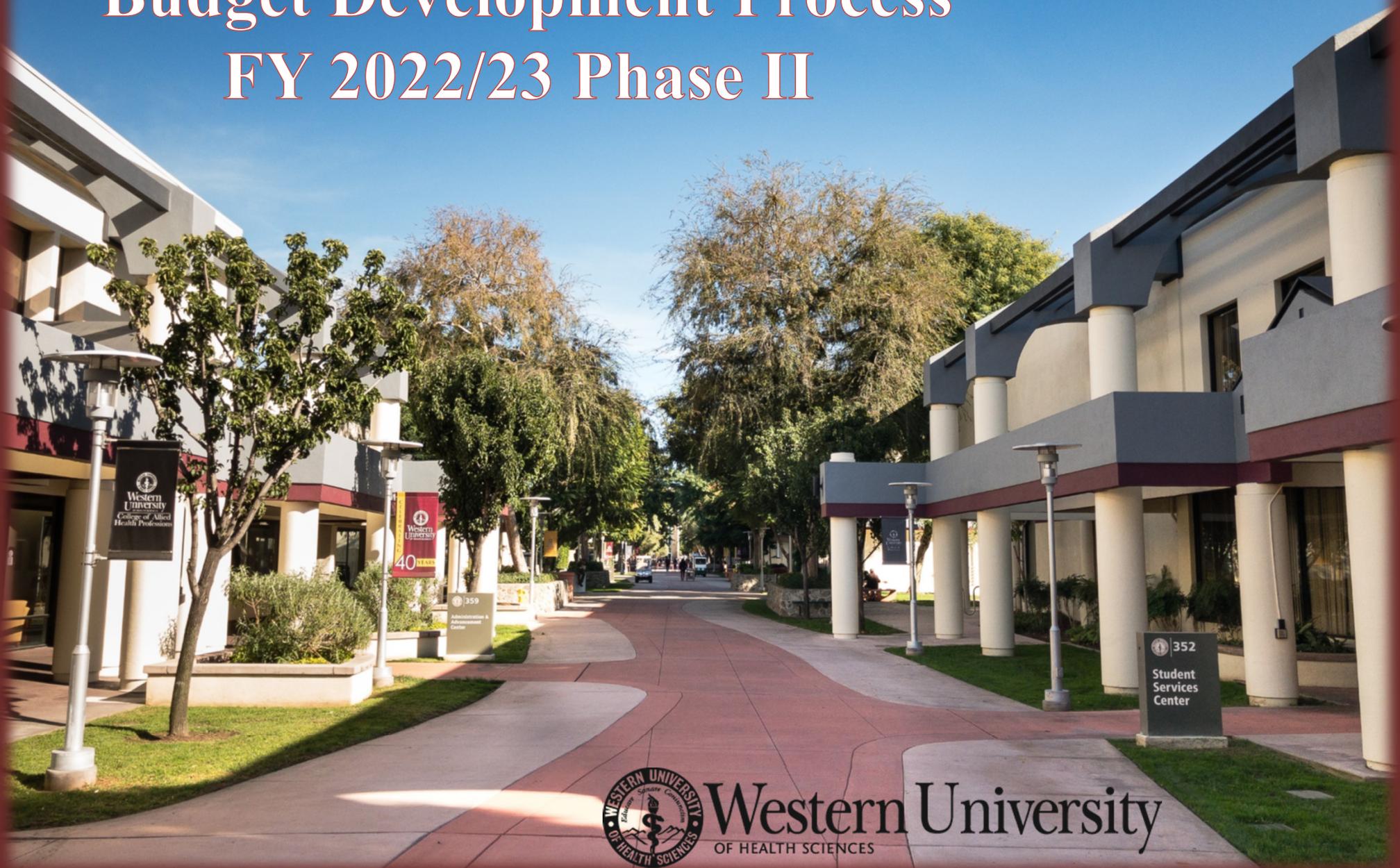


Budget Development Process

FY 2022/23 Phase II



Western University
College of Allied Health Professions

Western University
40 YEARS

359
Administration & Management Center

352
Student Services Center



Western University
OF HEALTH SCIENCES

Objectives



- **Budget Process Overview**
- **FY 2022/2023 Budget Development in BudgetPak**
- **Complete and Save Salary Worksheets in the W Drive**
- **Complete Budget Development Process due: May 9, 2022**

Communication of Process



- **Budget Development Process Information Phase II**
- **All materials are in the W Drive and on the Office of Budget Administration web site**



Budget Development Process Phase II

- **2022/23 Budget approved by Board of Trustees**
- **Re-allocate budget lines, complete salary budget worksheets and faculty contracts**



Updates



- Complete Budget Authorization Form
- Use **2023 Budget Development** Version for BudgetPak
- Annual Salary Pool of **2.5%** approved by the BOT
- Fringe Benefit Rate remains the same at **33.2%**
- Send email for BudgetPak Phase II Training if needed
- Budget Development Deadline: **May 9, 2022**

University Budget Advisory Committee (UBAC)

The University Budget Advisory Committee reports to the President on matters related to the university annual budget process and the priority-based resource allocation.



Preliminary Preparation

Planning and Creating the 2023 Budget Development

- Create budget vs. actual variance analysis.
- Review deficit accounts requiring budget adjustments (reallocation).
- Identify historical spending patterns.
- Identify and adjust for any anticipated expenditure.
- Synchronize College/Department Strategic Plan(s) with the Budget.



Preliminary Preparation

MENU

Search...



Western University
OF HEALTH SCIENCES

Office of Budget Administration

About

Budget Information

FAQs

Forms

Policies

Contact

BUDGET INFORMATION

Budget Budget Information



About

Budget Information

FAQs

Forms

Policies

Contact

Budget Transfers

[Self-Service Operating and Capital Budget Transfer Tool](#)

[Self-Service Budget Transfer Instructions Handout](#)

[Budget Transfer Form](#)

Budget Queries

[Self-Service Budget Queries Tool](#)

[Self-Service Budget Queries Instructions Handout](#)

BudgetPak Information

[BudgetPak Link](#)

[Running Reports with BudgetPak Instructions](#)

[Running Reports with BudgetPak Instructional Video](#)

[Phase I Requesting Top Three Priorities with BudgetPak Instructions](#)

[Phase I Requesting Top Three Priorities with BudgetPak Instructional Video](#)

[Phase II BudgetPak Budget Development Instructions](#)

Preliminary Preparation

Budgeting Tools: <http://www.westernu.edu/budget/budgeting-tools/>

BudgetPak Information

[BudgetPak Link](#)

[Running Reports with BudgetPak Instructions](#)

[Running Reports with BudgetPak Instructional Video](#)

[Phase I Requesting Top Three Priorities with BudgetPak Instructions](#)

[Phase I Requesting Top Three Priorities with BudgetPak Instructional Video](#)

[Phase II BudgetPak Budget Development Instructions](#)

[Phase II BudgetPak Budget Development Instructions Video](#)

[Phase II BudgetPak Budget Development Instructions – Power Point](#)

[BudgetPak FAQs](#)

[BudgetPak Key Terms](#)



Complete the budget process

- Review, reconcile, and balance the budget
- Review and validate all information
- Approval of Dean or Department Head
- Complete the BudgetPak forms, salary budget worksheets with annual increases and faculty contracts

What is BudgetPak?

- Cloud-based budgeting solution designed to use interfaces to make a complex process user friendly
- It makes the reallocation process of budgeted funds seamless
- Consolidates at the rollup level
- On demand reporting
- Improves Accountability



BudgetPak Software Phase II Training

Sign up for BudgetPak Phase II Training via email to Budget@WesternU.edu

- Individual basis by request
- Training will cover:

- 1 • How to access BudgetPak
- 2 • How to reallocate budgeted funds
- 3 • How to access and upload files
- 4 • How to create budget reports
- 5 • How to complete, sign off, and approve the operating budget

The following information will be saved in the W Drive:

- Phase II BudgetPak Budget Development Instructions
- Budget Process Time & Responsibility Schedule

BudgetPak Overview - Accessing BudgetPak

- ✓ Go to: <https://westernu.mybudgetpak.com>
- ✓ Log In to BudgetPak

BudgetPak™
Budget. Forecast. Report.

Log In

Username

.....

Log In

[Browser settings tips](#)

BudgetPak Overview - Accessing Budget Development

Home Menu

BudgetPak™
Budget. Forecast. Report.

Home Versions Status Reports About

Welcome BO Training! [Log Out](#)

The last company you were working with was:
[Western University of Health Sciences](#)

The last unit you were working with was:
[10013: Base Unit B \(Training\)](#)

The last version you were working with was:
[2018 Operating Budget](#)

You have important messages!
[View your messages](#)

What would you like to do, BO?

+ Create new

Create a new version of a budget/forecast for 'Base Unit B (Training)'.

↻ Open last

Open up budget '2018 Operating Budget' for viewing or editing.

📄 Open different

- Open up a different budget/forecast for 'Base Unit B (Training)' for review or editing.
- -OR- Select a different unit or version to budget/forecast.
- -OR- Just take an overall look at the budget/forecasts you're working on.

Status Menu

BudgetPak™
Budget. Forecast. Report.

Home Dashboard Versions **Status** Reports Projections Configuration About Welcome

Status

Here is an overview of the status of your units.

Select version

Most current version
Note: Status indicators (needs rollup, signed off, etc.) are not meaningful in this view and will not be displayed.

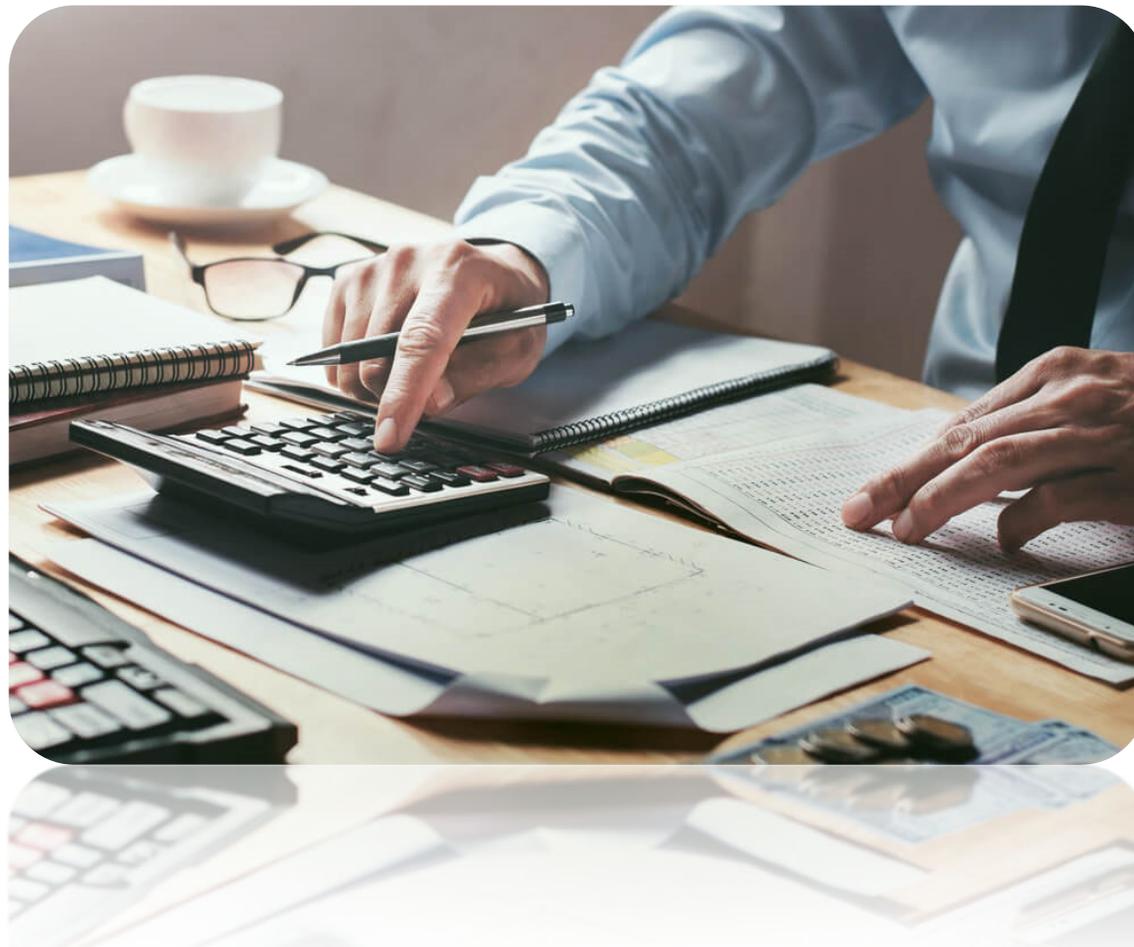
This version:
[2022 Budget Development](#)

[Update the view with these selections](#)

Unit code	Description	Status	Expense	Modified	Budgetholder	Version
1001	Rollup Unit (Training)	Approved	\$269,681	2021-02-18 12:33 PM	Training, BO	2022 Budget Development
10012	Base Unit A (Training)	Approved	\$267,633	2021-02-18 12:33 PM	Training, BO	2022 Budget Development
10013	Base Unit B (Training)	Approved	\$2,048	2021-02-18 12:33 PM	Training, BO	2022 Budget Development

Reallocating the Budget

This is the **only time** to make permanent budget adjustments. All accounts need to be adjusted for anticipated expenditures.



BudgetPak Overview - Reallocating

Across the board (all line items) Menu

BudgetPak™
Budget. Forecast. Report.

Home Dashboard Versions Status Reports Projections Configuration About Welcome

Navigation ActionPaks What if...? View/edit drivers **Across the board (all line items)** Monthly spreading (all line items) Notes Files

Currently viewing
Company: Western University of Health Sciences
Unit: 10012: Base Unit A (▼)
Version: 2022 Budget Developm (▼)
Your budget's status is: ● Complete

Headcount/FTE
As of 7/1/2021: -
Additions: -
Reductions: -
As of 6/30/2022: -

Version comparison
Expense line items (▼)
2020 Actuals: -
2021 Actuals: -
2021 Adopted Budget: -
2022 Budget Development: \$267,633

This unit:
Base Unit A (Tra
Total: - +\$267,
Your - +\$267,
- +\$267,
\$267,633

FYI

Make across-the-board changes to Base Unit A (Training)

Instead of stepping through each line item in one at a time, you may make changes to all line items at once.
Each stack in the configuration will contain the following defaults for quick budget changes and spreading.

Discard Close

Skip this page if you've changed your mind and want to be guided through these items one at a time.

You have unsaved changes

Step 1

Which line items would you like to change?

Income line items

Expense line items

Step 2

How would you like to handle percent changes?

Change every discretionary line item by a pre-defined percent

Change every discretionary line item by the same percent

Change every discretionary line item (EXCEPT SOME) by the same percentage

Change line items individually

Line items

Base Unit A (Training) line items: Recalc Show/Hide

Account number	Line item	2021 Adopted Budget	% Increase	\$ increase	\$ per head	2022 Budget Development	Account note
70935	Honoraria	\$0	0.00 %	\$250	\$0	\$250	from 10012-70950
70950	Printing	\$0	0.00 %	(\$150)	\$0	(\$150)	To 10012-70935
7920	Equipment	\$0	0.00 %	\$1,000	\$0	\$1,000	
7625	Contingencies Independent Contr_Emp	\$0	0.00 %	\$0	\$0	\$0	
7739	Strategic Planning Groups	\$0	0.00 %	\$0	\$0	\$0	
6000	Salaries - Faculty Full Time	\$0	0.00 %	\$150,000	\$0	\$150,000	
6001	Salaries - Faculty Part Time	\$0	0.00 %	\$50,100	\$0	\$50,100	
6501	Wages Faculty Staff-Part Time	\$0	0.00 %	\$0	\$0	\$0	
6200	Salaries - Administration Full Time	\$0	0.00 %	\$0	\$0	\$0	
6600	Wages Admin Staff-Full time	\$0	0.00 %	\$0	\$0	\$0	

What to include as notes:

1. List any College/Department Strategic Plan, Program Review, and any items related to student outcome under the account note column.
2. List all expected capital purchases under budgeted capital accounts (79XXXs).
3. Reference to and from amounts, organization number, and account numbers.

BudgetPak Overview - Report(s)

Report(s)

BudgetPak™ Reporting
Budget. Forecast. Report.

Send to PDF Send to Excel Send to Excel (data only) Send to Excel (data only): For advanced users. Not available for all reports. May include blank columns that are not used with current report selections. NOTE: This report

1 of 2 Find | Next

Annual Report

Company: Western University of Health Sciences
Version: 2022 Budget Development
Comparison version: 2021 Adopted Budget
Unit: 10012: Base Unit A (Training)
Budget holder: Training, BO (botraining)

Account	Description	2022 Budget Development	2021 Adopted Budget	Variance amount	Variance %	Notes for 2022 Budget Development
6000	Salaries - Faculty Full Time	150,000	0	150,000	100.0 %	
6001	Salaries - Faculty Part Time	50,100	0	50,100	100.0 %	
Faculty Expenses		200,100	0	200,100	100.0 %	
6850	Allocated Fringe Benefits	66,433	0	66,433	100.0 %	
Fringe Benefits		66,433	0	66,433	100.0 %	
70935	Honoraria	250	0	250	100.0 %	; From 10012-70950
70950	Printing	-150	0	-150	100.0 %	; To 10012-70935
Contracts and Consulting Services		100	0	100	100.0 %	

- The Dean or Department Head must review and approve the FY 2023 Budget Development.

BudgetPak Overview - Signing Off and Approving the Budget

Status Menu

The screenshot shows the BudgetPak interface with the 'Status' menu selected. The header includes the BudgetPak logo and navigation links: Home, Dashboard, Versions, Status, Reports, Projections, Configuration, About, and Welcome. The main content area is titled 'Status' and contains a 'Select version' sidebar and a table of budget units.

Select version

Most current version
Note: Status indicators (needs rollup, signed off, etc.) are not meaningful in this view and will not be displayed.

This version:
2022 Budget Development

Update the view with these selections

Here is an overview of the status of your units.

View Edit Rollup Sign off Revoke sign off Approve Revoke approval Show

Expand all Collapse all Status Key Filter

Unit code	Description	Status	Expense	Modified	Budgetholder	Version
1001	Rollup Unit (Training)	Signed off	\$269,681	2021-02-18 01:30 PM	Training, BO	2022 Budget Development
10012	Base Unit A (Training)	Approved	\$267,633	2021-02-18 01:29 PM	Training, BO	2022 Budget Development
10013	Base Unit B (Training)	Approved	\$2,048	2021-02-18 12:33 PM	Training, BO	2022 Budget Development

- ❑ Once the FY 2023 Budget Development is signed off and approved, no additional changes may be made.

Salary Budget Worksheets

Salary Budget Worksheets to be completed and saved in the W drive by May 9, 2022:

- ✓ Annual Salary Pool Increases
- ✓ Approved Position Modifications



Salary Budget Worksheets

- Verify all salaries and employee names for accuracy.

- Identify all salary increases to be recorded in the Salary Worksheets.
 - Please remember that the total amount of all salary pool increases cannot exceed the total amount of salary pool awarded for College/Department as indicated on the salary budget worksheets.

- Verify that the salary amount on the faculty contract is the same as on the Salary Budget Worksheet.

- Modify any approved changes on positions as needed on the Salary Budget Worksheet.

Salary Budget Worksheets

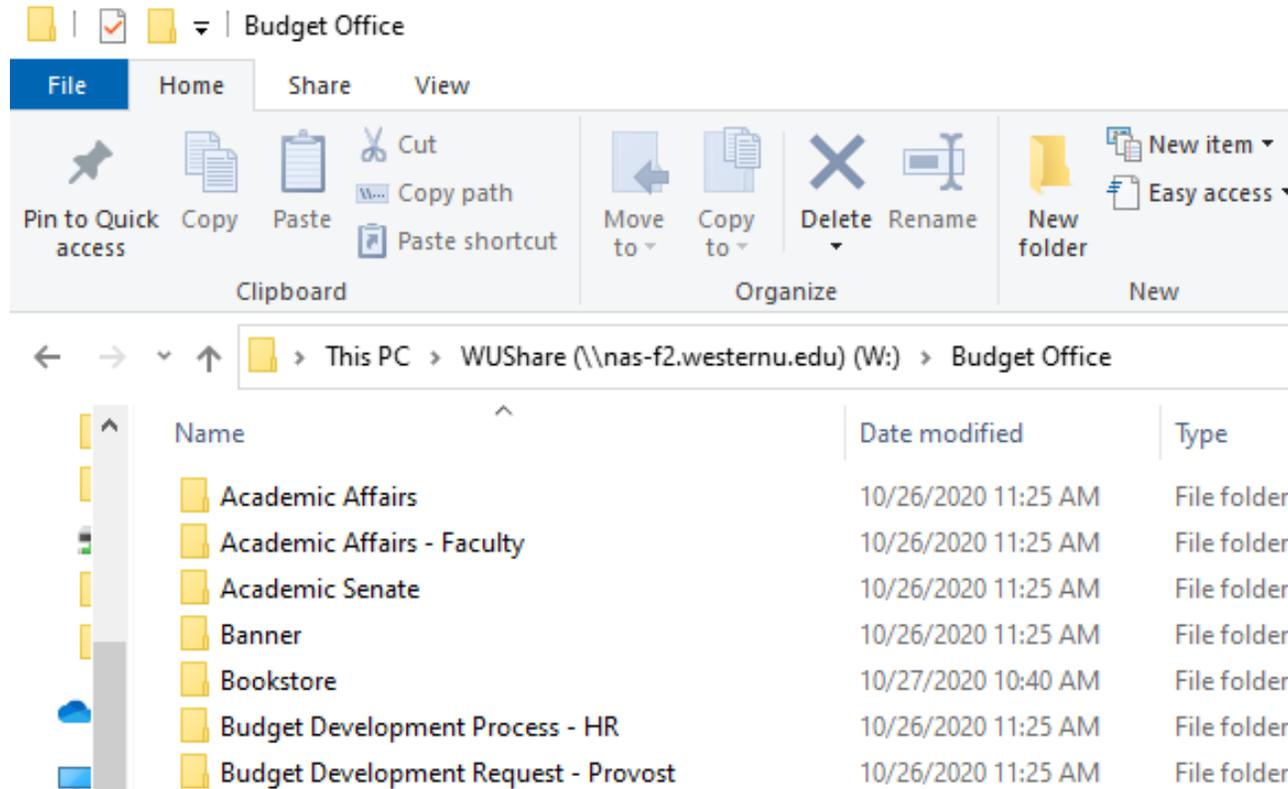
- ❑ Salary Increases over 6% require Human Resources' approval and a PeopleAdmin action form must be processed.

- ❑ Non-exempt salaries must be rounded to 2 decimal places and the annual salary must be calculated accordingly.

- ❑ Positions requiring a PeopleAdmin action form to be processed for an increase in salary, modification and/or extend time frame are those funded by Designated, Grant, Federal Work Study, and Temporary Funds.

Accessing Salary Budget Worksheets

Go to W:\Budget Office*Your Folder*



Folder will contain budget materials:

- Budget Process Time & Responsibility Schedule
- Instructions
- Salary Worksheets

Completing the Salary Budget Worksheets

Western University of Health Sciences
Salary Worksheet - Org 1111
For Fiscal Year Ending June 30, 2023

Instructions:

Please include any reallocations and salary pool increases. Also include all new positions and modifications to positions such as changes in account number, home org., title, promotions, FTE, and PCN movements between orgs. for each eligible employee within the highlighted areas. For new positions use empty rows located at the bottom of each section. For any questions please contact the Budget Office.

Position Control Number	Current Account Number	New Account Number	Employee Name or Title	Anticipated Hire Date	Current FTE	New FTE	Base Salary/Wage Level	Amount Reallocation	Amount Salary Pool Increase	% Salary Pool Increase	Amount Critical Needs Increase	Amount of Total Increase	Total % Increase	2022-23 Proposed Salary Wage Level	Comments
Operating															
222221	6200		Alvarez, Jane		1.000		45,000.00		1,125.00	2.50%		1,125.00	2.50%	46,125.00	
222222	6000		Smith, John		1.000		80,000.00		2,000.00	2.50%		2,000.00	2.50%	82,000.00	
222223	6601		VACANT		0.750	0.000	10,400.00	(10,400.00)		0.00%		(10,400.00)	-100.00%	-	Moved \$10,400 to PCN 222229, Delete PCN 222223
222229	6601	6600	VACANT		0.250	1.000	10,000.00	10,400.00	510.00	5.10%		10,910.00	109.10%	20,910.00	Moved \$10,400 from PCN 222223
			Enter New Position						Not Eligible	Not Eligible		-	-	-	
					Salaries and Wages	3.000	\$ 145,400.00	\$ -	\$ 3,635.00		\$ -	\$ 3,635.00	2.50%	\$ 149,035.00	
					Fringe Benefits		48,272.80	-	1,206.82		-	-			
					Salaries, Wages, and Fringe Benefits		193,672.80	-	4,841.82		\$ -	-			
					Salary Pool Allotted				\$ 3,635.00						

Temporary, Federal Workstudy, and Honorariums/Adjunct															
222225	6905		Laurence, Mary		0.250		750.00					-	0.00%	750.00	
			Enter New Position						Not Eligible	Not Eligible		-	-	-	
			Enter New Position									-	-	-	
					Salaries and Wages	0.250	\$ 750.00	\$ -	\$ -		\$ -	\$ -	0.00%	\$ 750.00	
					Fringe Benefits		249.00	-	-		-	-			
					Salaries, Wages, and Fringe Benefits		\$ 999.00	\$ -	\$ -		\$ -	-			
					Total Salaries and Wages (1100)	3.250	\$ 146,150.00	\$ -	\$ 3,635.00		\$ -	\$ 3,635.00	2.49%	\$ 149,785.00	
					Total Fringe Benefits (1100)		48,521.80	-	1,206.82		-	-			
					Total Salaries, Wages, and Fringe Benefits (1100)		\$ 194,671.80	\$ -	\$ 4,841.82		\$ -	-			
					Salary Pool Variance				\$ -						

Grants and Designated Funds:															
			Enter New Position						Not Eligible	Not Eligible		-	-	-	
			Enter New Position									-	-	-	
					Salaries and Wages	-	\$ -	\$ -	\$ -		\$ -	\$ -		\$ -	
					Fringe Benefits		-	-	-		-	-			
					Total Salaries, Wages, and Fringe Benefits		-	-	-		\$ -	-			

Completed by: Jane Alvarez
Title: Budget Associate

Date: 4/2/22

All hourly rates on the non-exempt positions must only calculate to 2 decimal places when calculating the annual salary. Employees hired, promoted or had a salary increase during April 1st thru June 30th, are not eligible for the annual salary increase. Please indicate a planned sabbatical in the comments area.

Completing the Salary Budget Worksheets

Western University of Health Sciences
 Salary Worksheet - Org 1112
 For Fiscal Year Ending June 30, 2023

Instructions:

Please include any reallocations and salary pool increases. Also include all new positions and modifications to positions such as changes in account number, home org., title, promotions, FTE, and PCN movements between orgs. for each eligible employee within the highlighted areas. For new positions use empty rows located at the bottom of each section. For any questions please contact the Budget Office.

Position Control Number	Current Account Number	New Account Number	Employee Name or Title	Anticipated Hire Date	Current FTE	New FTE	Base Salary/Wage Level	Amount Reallocation	Amount Salary Pool Increase	% Salary Pool Increase	Amount Critical Needs Increase	Amount of Total Increase	Total % Increase	2022-2023 Proposed Salary Wage Level	Comments
Operating															
222226	6200		Lawrence, Ralph		1.000		32,000.00		800.00	2.50%		800.00	2.50%	32,800.00	
			Enter New Position						Not Eligible	Not Eligible		-	-	-	
			Enter New Position									-	-	-	
			Salaries and Wages		1.000		\$ 32,000.00	\$ -	\$ 800.00		\$ -	\$ 800.00	2.50%	\$ 32,800.00	
			Fringe Benefits				10,624.00	-	265.60		-	-	-	-	
			Salaries, Wages, and Fringe Benefits				42,624.00	-	1,065.60		\$ -	-	-	-	
			Salary Pool Allotted						\$ 800.00						
Temporary, Federal Workstudy, and Honorariums/Adjunct															
			Enter New Position						Not Eligible	Not Eligible		-	-	-	
			Enter New Position									-	-	-	
			Salaries and Wages		-		\$ -	\$ -	-		\$ -	\$ -	-	\$ -	
			Fringe Benefits				-	-	-		-	-	-	-	
			Salaries, Wages, and Fringe Benefits				\$ -	\$ -	-		\$ -	-	-	-	
			Total Salaries and Wages (1100)		1.000		\$ 32,000.00	\$ -	\$ 800.00		\$ -	\$ 800.00	2.50%	\$ 32,800.00	
			Total Fringe Benefits (1100)				10,624.00	-	265.60		-	-	-	-	
			Total Salaries, Wages, and Fringe Benefits (1100)				\$ 42,624.00	\$ -	\$ 1,065.60		\$ -	-	-	-	
			Salary Pool Variance						\$ -						
Grants and Designated Funds															
			Enter New Position						Not Eligible	Not Eligible		-	-	-	
			Enter New Position									-	-	-	
			Salaries and Wages		-		\$ -	\$ -	-		\$ -	\$ -	-	\$ -	
			Fringe Benefits				-	-	-		-	-	-	-	
			Total Salaries, Wages, and Fringe Benefits				-	-	-		\$ -	-	-	-	

Completed by: Jane Alvarez
 Title: Budget Associate

Date: 4/2/22

All hourly rates on the non-exempt positions must only calculate to 2 decimal places when calculating the annual salary. Employees hired, promoted or had a salary increase during April 1st thru June 30th, are not eligible for the annual salary increase. Please indicate a planned sabbatical in the comments area.

Completing the Salary Budget Worksheets

Salary Worksheets Summary (Fund 1100)		
Org. #	Reallocation	Salary Pool
1111	\$ -	\$ 3,635.00
1112	\$ -	\$ 800.00

Total from Worksheets \$ - \$ 4,435.00

Salary Pool Allotted \$ 4,435.00

Variance \$ -



Completing Salary Budget Worksheets

- Please make sure all salary increases are reflected in the salary budget worksheets in the W Drive by May 9, 2022.
- **IMPORTANT: Please remember to save a copy of the Salary Budget Worksheet and update with changes throughout the fiscal year.**



Reminders



All BudgetPak forms, Salary Budget Worksheets and Faculty Contracts are due by **May 9, 2022.**

Questions

Questions?

Please email questions to
Budget@Westernu.edu



Thank You



Thank you for your attention and participation in the Budget Development Process.