**Annual Budgeting Process Frequently Asked Questions**

Timeline

Q: When will I receive my allocation?

A: MSU-Bozeman allocations will be sent to VPs on May 29th, who will then distribute down to their units. This date is tentative; any changes to this date will be posted here. If you support a different campus and/or agency, please reach out to your individual fiscal manager for dates.

Q: What is the deadline for MSU Bozeman?

A: For MSU-Bozeman, you have until 8am on Monday, June 15th to complete, at which time your access will be turned off. For agencies, please reach out to your individual fiscal manager for dates. For other campuses, you have until EOB July 3rd.

Q: Is MSU Budget open?

A: “Labor Plan Files” are open in their entirety. “Budget by Index Files” are currently open for all non-current unrestricted funds (i.e. designated, restricted, etc.), and we recommend completing these now. “Budget by Index Files” for current unrestricted funds (aka CUF, state, or general funds) will open on May 29th. Although you can’t enter CUF budgets into MSU Budget until May 29th, you can begin conversations with your units so you have a general idea of how you want to budget and then only have minor modifications once allocations are sent.

Pay Plan

Q: Do I need to budget the FY20 and/or FY21 pay plan?

A: Annualization of the FY20 pay plan should be included in your position budgets and is already calculated in the Labor Plan files. For CUF indexes, budget authority will be provided via allocations. For non-CUF funds, no additional budget authority will be provided and must be accounted for within your existing revenue/expense budgets.

For FY21, pay plan for CUF indexes will be centrally budgeted and distributed when needed. For non-CUF funds, we recommend setting aside funds to cover the pay plan increases. We suggest projecting a 1% increase on Jan 1, 2021 and holding the funds in 61199 and/or 61299. For large units, please budget the pay plan for all subunits in only one index to simplify the future transfer.

Q: Who is eligible for pay plan?

A: All employees except students/GTAs. This includes professional staff, classified staff, tenure-track faculty, and NTTs.

Stipends

Q: I need to add a stipend to a position. How do I do that?

A: Please contact the Budget Office to get the stipend section added to that position. For further information, please watch the mini-video titled “Annual Budget Process – Labor Plan File FAQs”.

Q: What is the new stipend account code? Is it only for faculty?

A: 61123D should be used for stipends. As of right now, it is just for budgeting purposes and only for faculty. If you have a non-faculty stipend, please reach out to the Budget Office.

Benefits

Q: My FTE is changing. How do I account for the impact to benefits?

A: For Non-CUF indexes, you can use the benefit account codes as normal. For CUF-indexes, please use account 61199 and/or 61299 as a placeholder for the contribution to/return from the institutional benefits pool. Once budgets are finalized, the Budget Office will conduct a review of FTE/benefits to ensure appropriate funding and move money, as needed.

Q: If I have high workers’ comp employees, how do I adjust the benefits budget?

A: Please use the “Add’l Amount” column. . For further information, please watch the mini-video titled “Annual Budget Process – Labor Plan File FAQs”.

61199/61299

Q: What should I use 61199 and 61299 for?

A: There are three circumstances where these accounts should be used, all of which are placeholders. 1) Non-CUF projected pay plan expenses, 2) New positions that have not been created/built in Banner and therefore, are not in your Labor Plan file, and 3) Changes to benefits expenses related to CUF personnel expenses (i.e. FTE change).

Q: What is the difference between 61199 and 61299?

A: 61199 is for Professional/Admin positions. 61299 is for Classified positions.

Reports

Q: How do I export MSU Budget report to Excel?

A: Easiest way is to right-click on the tab name, select “Save As”, then “Save As Local File”. For further information, please watch the mini-video titled “Exporting MSU Budget Reports to Excel”.

Q: How can I access historical spending data?

A: We recommend using one of the “Budget to Actuals” report in MSU Budget and using the “Change View” option to select “Year on Year”. This will give you 5 years of historical data. For further information, please watch the mini-video titled “Annual Budget Process – Useful MSU Budget Reports”.

Other

Q: What if I have a position that’s in the incorrect Labor Plan file?

A: Unfortunately, we are not able to change the budget org in MSU Budget at this time since Labor Plan files have already been built. We recommend ensuring the Labor Distribution has the correct index so budgeted dollars flow to the correct place. In addition, please contact the Budget Office and provide the position number, the current org, and the new org. We will update when we load into Banner. Note that budget orgs can only be updated at the start of the year before any payroll and/or encumbrances have posted.