FY 2018 Budget Formulation

PBF Open Session
Today’s Agenda

- New Look
  - PBF – Decentral Tab
- PEP
  - FY 2018 Salary Increases
  - Noted items for FY 2018
- PBF overall process
- Resources available
- Demos
- Open Q&A
New Look

- The PBF tab in UCFlex name changed from “Budget Formulation” to “PBF Decentral”.

- Under “PBF Decentral”, users may find a “PBF Home” tab that includes a link to the website and instructions along with OBM contact information.

- The reporting tab includes standard “PBF/PEP Reports” along with “Summary Reports” used in building the budget book schedules.
PEP – Salary Increase

- FY 2018 salary increases are to be department funded.

- Approved FY 2018 contractual increases as of February COB are included in PEP calculations. These include the following:
  - AAUP – 2% (ATB ONLY, compression and benchmark should be budgeted separate)
  - AFSME – 2%
  - IUOE – 1.5%

- FOP, ONA, and SEIU negotiations are still taking place. We recommend budgeting increases separately as recommend by VP area.

- Unrepresented increases are not included in PEP and should be budgeted separately as well.
PEP – New Positions

- The steps used to create new positions remains the same.
- The job list is values containing the 6 digit commitment item. The description is the name of the commitment item where PEP will calculate.
- A cross-walk is no longer used.
High-Level Process

- Create forms for general and local funds.
- Run PBF BW reports to analyze loaded data.
- Analyze data from BW reports and note any adjustments to budget or employee/position to be made.
- Update budget, cost distribution, etc. in the appropriate form – general expenditures, local funds, employee and/or position maintenance tabs.
- Re-run PBF BW reports to validate changes.
- Complete final review.
- Advance to next stage.
Resources/Help

- Budget Formulation Instructions, Tips and Guidelines
- PBF How to videos - [http://www.uc.edu/af/budgetfinsvcs/budgetmgt/pbf.html](http://www.uc.edu/af/budgetfinsvcs/budgetmgt/pbf.html)
- VP Contacts
- Office of Budget Management
  - OBMMail@uc.edu
  - Kelly Beck, 6-0378
  - Chris Jackson, 6-3150
  - Lync!
Demos

- Upload – Replace All
Today’s Action Items

- Log-on to PBF (Production)
- Review PBF hierarchy – PBF600
- Create new forms
- Run PBF BW reports and validate data
  - Review general and local funds budgets, employee and position cost distribution.
- Enter budget data in forms and save
- Ask questions

**All forms created and any budget data saved during this session may or may not be available when PBF is officially open on Monday 3/20/2017**