

Budget Prep System Training

FY 2027
Budget Cycle

Agenda

NEW FY IMPORTANT DATES AND DEADLINES

CURRENT LEGISLATIVE OUTLOOK AND DEPARTMENTAL FRINGE IMPACTS

NEW FY SALARY POLICY

HR TRANSACTION PROCESSING

BUDGET PREP SYSTEM TRAINING – NEW PROCESSES

- PRE-PREP CHECKLIST, PLANNING, ENTERING, FINAL PREP CHECKLIST

MORE BUDGET TIPS

ANALYST DIVISION CONTACTS

Important Budget Prep Dates and Deadlines

May 4th

- Budgets released for data entry
- Targets distributed to Dean/VPs
- Budget guidelines to Orgn Managers

May 25th

Memorial Holiday

May 22th

- FY27 HR transactions are due to HR level through PASS
 - Reclassifications
 - New position
 - Salary Reviews

May 28th

- Budgets are due to the Budget Office
- Budget Prep will close at 5 pm (CT)
- Each Division may have earlier deadlines

Legislative Outlook

Legislative Outlook

- Second year of the biennium.
 - No new funding for FY27.
- TRS Contributions
 - Employer and Employee remain the same at 8.25% for FY27.

Fringe Benefit Update

Changes to departmental fringe responsibilities on local funds:

- Insurance rate estimate is an increase of 8%.
- Fringe rates have decrease by .10% based on current estimates.
 - The Retiree Insurance rate decreased from 2.00 % to 1.90%.
 - The Lump Sum Vacation pool rate remained at .90%.
 - The Workers Compensation/Unemployment Compensation rate remained at .20%.
- The Optional Retirement Program rate remained at 6.8%.

FY27 Salary Policy

Effective 9/1/2026



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FY27 One-Time Merit or Base Salary Merit Increase

- No mandatory performance-based salary increase.
- A funding-dependent and optional 2% pool for a percentage-based salary increase or a One-Time Merit Payment is approved for all team members effective 09/01/2026.
- This policy allows for an increase to base salary or a one-time merit payment with a 5% maximum awarded to any individual qualifying employee.
- Faculty are not included in this policy. Deans establish the salary policy for faculty. Faculty are allowed a one-time merit payment.
- The selection of individuals and the amount of merit increase shall not be made based on a team member's race, color, religion, sex, national origin, age, disability, or status as a protected veteran. The incentive should be allocated based on performance.

FY27 – Awarding the Merit

Guidelines must be followed regardless of payment distribution.

- May award more than 2% for a high performing team member and less than 2% for a low performing team member.
- Award may not exceed 5% for any individual employee.
- Determination of award amount is based on the supervisor's knowledge of the team member's overall job performance and values-based behaviors. It is the supervisor's responsibility to identify those not eligible for the merit.
- Division total award should not exceed the 2% pool.

FY27 – Merit Eligibility

- Team members employed on or before March 1, 2026, in a benefits-eligible position.
 - ▷ The position must be at least .5 FTE for six (6) months or longer.
- Team members must have at least one Annual Performance Review completed and submitted in the system between September 1, 2025 and August 31, 2026.



FY27 – Merit Ineligibility

- Team members who receive salary adjustments, reclassifications, promotions, or job changes after March 1, 2026.
- Team members who do NOT complete an Annual Performance Review for FY26 by August 31, 2026.
- Team members with Corrective Actions issued between September 1, 2025 and September 1, 2026.
- Team members who have other performance or conduct concerns, as determined by their supervisor
- Supplemental positions like secondary and overload positions are not included



FY27 – One-Time Merit/Base Salary Merit Increase

POOL

Departments will be designated a 2% of eligible salaries for the merit pool.

This pool has been calculated and reflected on the Merit Report.

FUNDING

Educational and General Funds

- Must be within targets provided to the Deans and Vice Presidents.

Other Funding Sources

- Must be within revenue budget in the FY2027 Operating Budget.



FY27 – Merit Report

One comprehensive report located in Budget Prep Step 2-5 folders

068_SPLAN – Merit Report (Chart H Only)

- By Supervisor
- All staff team members listed
- Eligibility indicator
- 2% Pool Contribution
- Merit Awarded
- Remaining Pool Balance

NOTE:

Employees ineligible due to performance is based on supervisor knowledge. These employees will reflect as eligible on the report.



FY27 – Merit Report Max of 5%

Located in Budget Prep Step 3-5 folders

157_SPLAN – Merit > 5%

Report lists team members with merit award greater than 5% in Salary Planner.

For FY2027, the one-time merit payment or a merit increase to base salary may not exceed 5% for any individual employee.



FY27 – Merit OMP Report (Staff Only)

For FY27

Located in Budget Prep Step 3-5 folders

069_SPLAN – Merit OMP Report (Chart H Only)

Report lists all who are eligible for a one-time merit payment who did not receive a merit increase to base salary in Salary Planner.

Report will also include the department/division pool still available to be awarded.

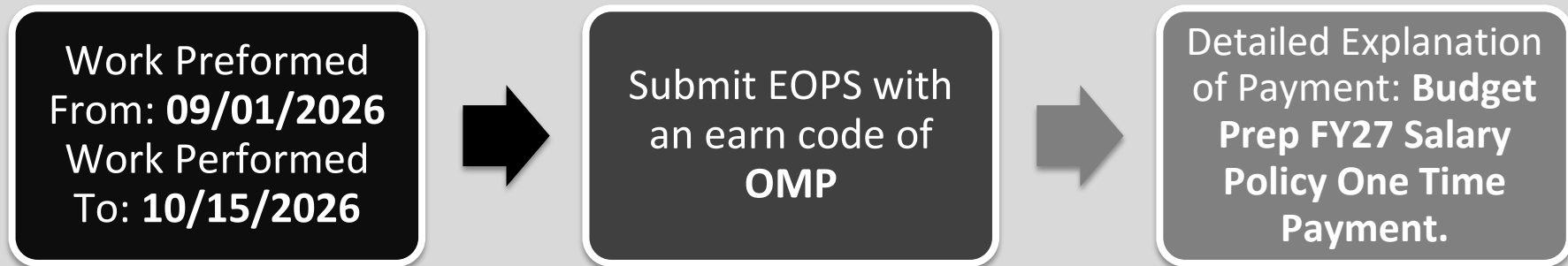
The report will need to be completed by each department and consolidated by your Budget Prep Division head. Budget Office will require 1 report from each Division as part of locking Budget Prep.

Report must be sent to hscbud@ttuhsc.edu

Run this report after you have entered merits in Salary Planner



FY27 – Merit OMP Process for Staff and Faculty



- Departments can start submitting EOPS in August through October 1st.
- Deadline to submit is Oct 1st.
- SM will be paid on Oct 25th and MN will be paid Nov 1st
- Budget for the FY27 payment must be in 6008 for the OMP EOPs
 - ▷ Program code must follow normal PClass protocol.
- Staff OMP will be verified against Merit OMP Report submitted by Budget Prep Division Head.



FY2027– Local HR Contact

Abilene/Dallas

- Devona Smith (806) 414 - 9950 Devona.Smith@ttuhsc.edu
- Samantha Normand (325) 696 - 0406 snormand@ttuhsc.edu

Amarillo

- Devona Smith (806) 414 - 9950 Devona.Smith@ttuhsc.edu
- Kristen Hammonds (806) 414 - 9950 Kristen.Hammonds@ttuhsc.edu

Lubbock

- Kelly McGinnis (806) 743 - 4210 Kelly.McGinnis@ttuhsc.edu

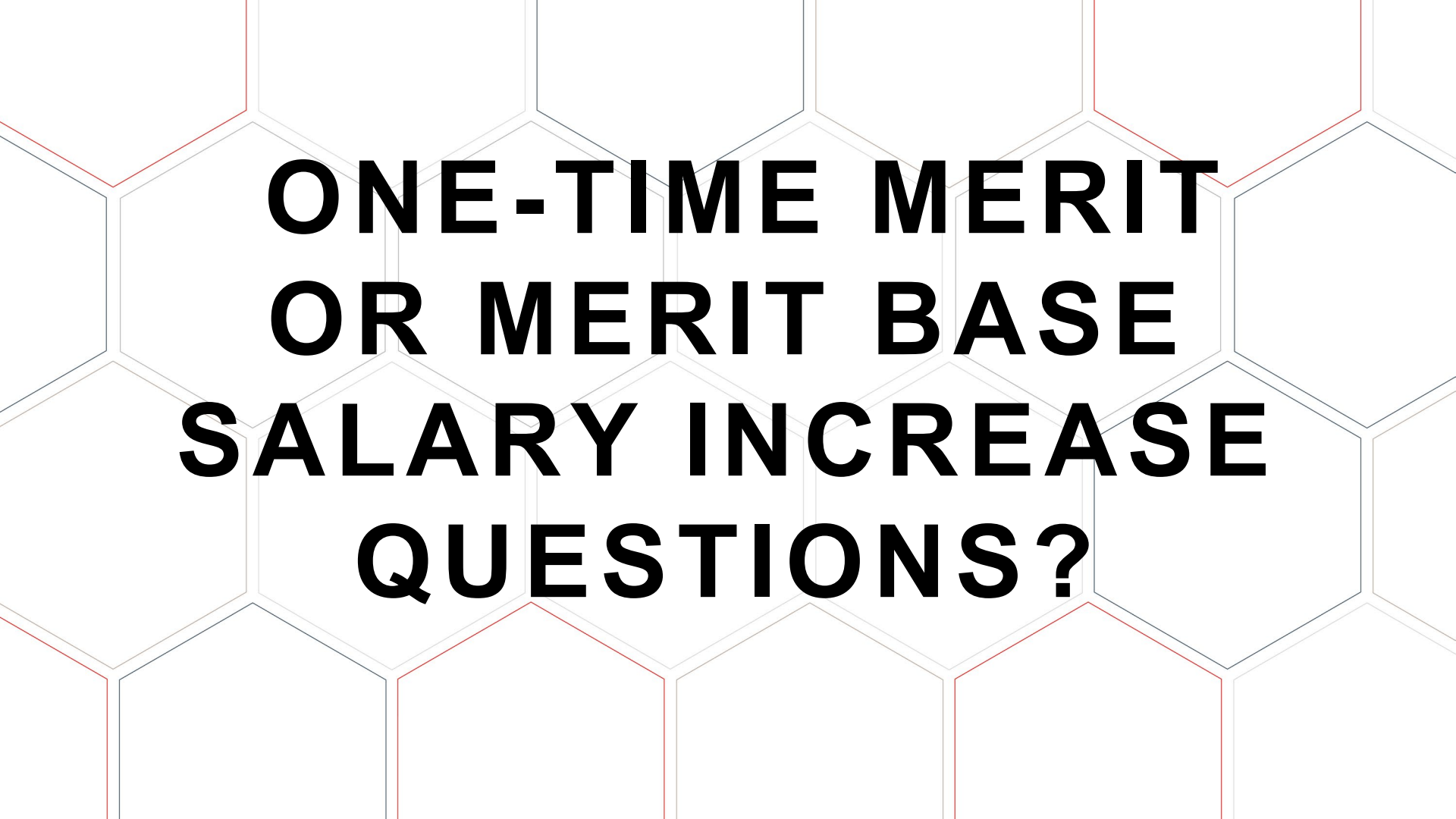
Strategic Initiatives

- Sandra Garza (806) 743 - 3553 Sandra.Garza@ttuhsc.edu
- Donna Bottema (806) 743 - 9570 Donna.Bottema@ttuhsc.edu

Permian Basin

- Devona Smith (806) 414 - 9950 Devona.Smith@ttuhsc.edu
- Jeanie Cloud (432) 703 - 5150 Jeannie.Cloud@ttuhsc.edu



The background of the slide features a repeating pattern of hexagons. Each hexagon is defined by a thin line, with some lines being red and others being blue, creating a subtle geometric texture.

**ONE-TIME MERIT
OR MERIT BASE
SALARY INCREASE
QUESTIONS?**

HR Transactions

Faculty Promotions/ Increases

Enter salary increase into Salary Planner in the equity column

HR will update title changes

New Positions

Submit request in PASS

Budget funds in 6006 in Budget Development and add a comment

HR Transactions

Remember!!

Staff Equity Adjustments and Reclassifications

- Enter salary adjustment in the equity column and include comments in Salary Planner
- Submit PASS transactions
- Titles will update when action is approved by the Budget Office
- Amounts entered and not supported by a PASS transaction will be removed or adjusted to the amount on the PASS transaction
- Please do not try to create or submit a PASS transaction on the weekend

HR Transactions

Staff Equity Adjustments and Reclassifications

- Departments are able to award a merit along with a Salary Review or a Reclassification effective 09/01/2026
- Full amount on transaction must include merit and match the Proposed Amount in Salary Planner
- These transactions should include in the “Justification For Request” a breakdown of the Salary Review or Reclass amount and the merit amount.

Example: **Current Salary \$50,000 +\$2,300 Equity + \$1,400 Merit = \$53,700**

- If amounts are not specified on the PASS transaction, the Budget Office *will remove merit and enter the entire amount as equity.*

HR Transactions

[Employee Dashboard](#) • [Salary Planner](#) • [Employee Detail](#)

Employee Detail

Employee

Name and ID:

Home Organization:

Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Rate	Proposed Rate	Base Salary	Equity Percent	Equity Amount	Merit Percent	Merit Amount	Proposed Salary	Links	Exclude from Totals
	204011 - General Services Ode	1	1.000	16.510000	16.840200	34,342.12	2.00	686.842400	0.00	0.000000	35,028.96	Distribution Comments	☐
Total		1	1	16.510000	16.510000	34,342.12	0.00	0.00	0.00	0.00	34,342.12		

Extract Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
204011 - General Services Ode	1	1	34,342.12	0.00	0.00	34,342.12
Total	1	1	34,342.12	0.00	0.00	34,342.12

Save

Reset

Previous

Next

[List By Employee](#) • [List By Position](#) • [Position Filter](#) • [Employee Filter](#) • [Summary Totals](#)

Enter ANY salary adjustment in the Equity Amount column and save.

Then enter a comment here

Job Comments

Name and ID: Position-Suffix and Title:

Last Updated by: Last Updated on:

Comments

Entering a 2%, 686.8424, for a salary review.
Entering \$686.8424 for a reclass

Remaining Characters : 1221

Save

Reset

Remember to save!
Employee Detail

HR Transactions

REMINDER!

HR Actions MUST be in the HR approval queue by the deadline ~ Friday, 5/22

- Departments (Originators) are responsible for ensuring these actions make it to HR approval level.
- HR will process the action to the Budget Office level after the HR deadline.

Any PASS transactions that do not get submitted by the HR deadline for FY27 will need to wait to be submitted.

- May 23th – Too Late! **Do Not** submit FY27 Transactions. The PASS system reads current information which will not include updated information from Salary Planner. You must wait until September to start FY27 actions.
- Missing the deadline means you must wait to START the new FY transaction until 9/1

Please do not try to START ANY FY27 actions after the budgets are locked until 9/1

- This is to avoid additional work of returning, restarting, or delaying transactions.

PASS Submission Dates and Deadlines

May 4th

- You can START new FY Transactions
- HR starts reviewing FY27 Transactions

May 23rd

- DO NOT start a PASS transaction for the new FY, deadline has passed

July 31st

- HR Deadline for current FY transactions

May 22nd

- FY27 HR transactions are due to HR approval level through PASS
- These must be at the HR level

September 1st

- You can NOW start a transaction for the NEW FY.
- PASS will now read all Salary Planner information that was entered in the summer.

HR Transactions

Increase Type	PASS Transaction Required?	Salary Planner/Budget Development Entry	EOPS System Entry Required?
Market Increase	Yes	Salary Planner: Enter the amount in the <i>Equity</i> Column	No
Merit Increase to Base Salary	No	Salary Planner: Enter the amount in the <i>Merit</i> Column	No
One Time Merit Increase (OMP)	No	Budget Development: Enter the Funds/Budget in <i>6008-Other Employee Payments</i>	Yes, submit EOPS between 8/1/2026 and 10/1/2026*
Market Increase & Merit Increase to Base Salary	Yes	Salary Planner: Enter the Market amount in the <i>Equity Column</i> AND Enter the merit amount in the <i>Merit Column</i>	No
Market Increase & Merit Increase through OMP	Yes	Salary Planner: Enter the Market amount in the <i>Equity Column</i> Budget Development: Enter the Funds/Budget in <i>6008-Other Employee Payments</i>	Yes, submit EOPS for the OMP between 8/1/2026 and 10/1/2026*



**QUESTIONS ON
HR TRANSACTIONS
OR DEADLINES?**

BUDGET PREP

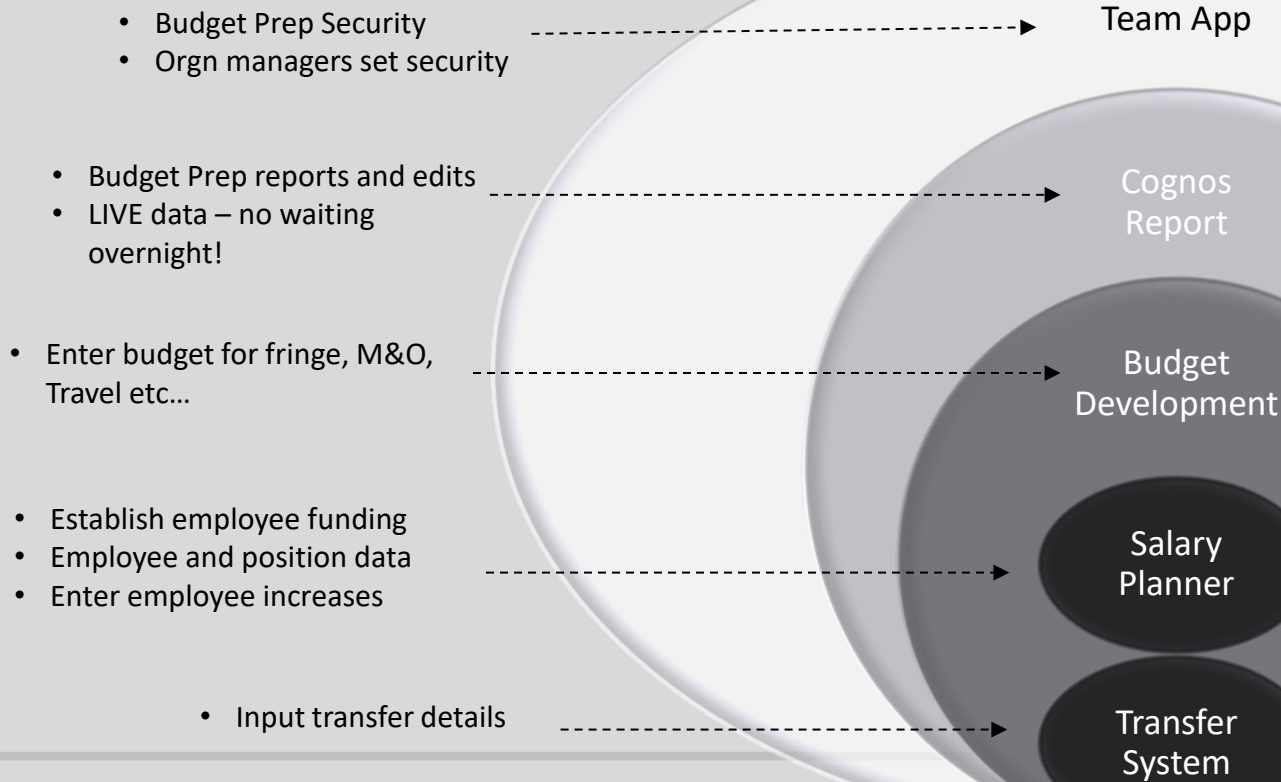
Working in the System

BUDGET PREP SYSTEM TRAINING

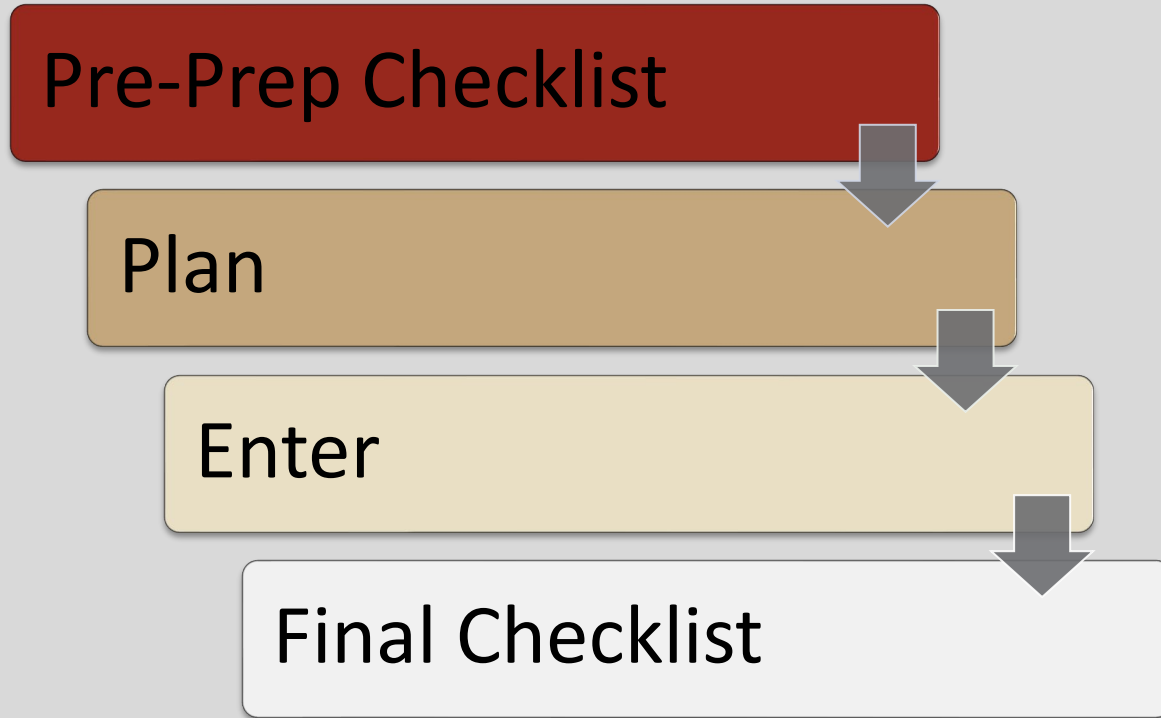


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BUDGET PREP SYSTEM OVERVIEW



BUDGET PREP CYCLE



Pre-Prep Checklist

A step by step checklist has been created to guide users on pre-prep actions. This checklist, as a PDF, has clickable links to be able to guide you through the following:

Orgn Security

- Verify who has security to your Orgns

The TeamApp System

- Ensure appropriate staff members have security to the Budget Prep System

Pre Prep Cognos Reports

- See what loaded: Budget>Budget Prep>HSC and HSC El Paso>Step1: Pre-Prep Reports
- Review staffing needs and prepare HR actions
- Estimate future revenue budgets on revenue generating funds
- Review current spending to estimate expense budget needs



Pre Prep Checklist, Report

- 051_SPLAN – Position Roster, Longevity, and Fringe Estimate
 - ▷ This report is combining three reports into one!
 - Positions Roster by FOP
 - Longevity Estimate
 - Fringe Estimate
 - ▷ Running by Position Orgn will give all positions regardless of vacant or filled, & single or pooled.
 - ▷ Running by FOP will give estimates of salaries fringe and longevity on that FOP.



Location of Cognos prep reports

The screenshot displays the IBM Cognos Analytics interface. On the left, a dark sidebar contains navigation options: Home, New, Upload files, Content, Recent, and Manage. A red dashed arrow points from the 'Content' option in this sidebar to the main 'Content' view. The main view has a top bar with 'IBM Cognos Analytics', a 'Content' dropdown, a search bar, and user icons. Below this, the 'Content' section is active, showing tabs for 'My content', 'Team content', and 'Samples'. A red box highlights the text 'Switch to a list view' in the top right of the content area. Below the tabs, there are three report cards: 'Audit Reports' (last accessed 4/1/2010, 3:51 PM), 'Budget' (last accessed 3/16/2022, 2:32 PM), and 'DMFR Development' (last accessed 1/28/2022, 8:35 AM). A red dashed arrow points from the 'Switch to a list view' box to a list view icon (three horizontal lines) in the bottom right corner of the report cards area.

IBM Cognos Analytics

Content

Search Cognos Analytics

Content

Upload data

New

Switch to a list view

My content Team content Samples

Audit Reports
Last Accessed 4/1/2010, 3:51 PM

Budget
Last Accessed 3/16/2022, 2:32 PM

DMFR Development
Last Accessed 1/28/2022, 8:35 AM



Location of Cognos prep reports

The screenshot shows the IBM Cognos Analytics 'Content' page. The breadcrumb trail is 'Team content / Budget / Budget Prep / HSC and HSC EL PASO'. A red callout bubble points to the 'HSC and HSC EL PASO' folder with the text 'Follow path way to step folders.' Below the breadcrumb, a table lists various folders. The last five folders, from 'Step 1: Pre-Prep Reports' to 'Step 5: Reports for Budget Prep Approvers', are enclosed in a black rectangular box.

IBM Cognos Analytics

Content

Content

Upload data

New

My content Team content Samples

Team content / Budget / Budget Prep / HSC and HSC EL PASO

Follow path way to step folders.

☐	Name	Type	Last Accessed
☐	Budget Book / Target Development	Folder	5/11/2016, 3:24 PM
☐	Budget Prep Analyst Review	Folder	6/2/2021, 3:33 PM
☐	Informational Prep Reports	Folder	4/20/2015, 4:00 PM
☐	Step 1: Pre-Prep Reports	Folder	2/24/2022, 2:48 PM
☐	Step 2: Reports to Start the Prep Process	Folder	2/24/2022, 2:48 PM
☐	Step 3: Reports While Working in Budget Prep	Folder	5/18/2021, 5:15 PM
☐	Step 4: Finalizing the Budget - MUST Run Before Locking Budget	Folder	2/24/2022, 4:08 PM
☐	Step 5: Reports for Budget Prep Approvers	Folder	2/24/2022, 4:08 PM

NEW YEAR, NEW REPORT PARAMETERS

BUDEV

Budget/Budget Phase – H2027 – H27DPT

SPLAN

Extract/Scenario – H2027 – H27SAL

Optional on Reports

Fund/Orgn

Clicking on “Finish” will run the reports for all the orgns you have access to.



Plan

- After reviewing your starting place, you can now plan for possible changes
- Plan for possible changes by reviewing staffing needs, gathering information, and start processing PASS transactions.

Faculty Promotions

Salary Reviews

New positions

Reclassifications

When? Now! HR Deadline is earlier than Budget Due Date

- New positions
- Salary Reviews
- Reclassifications



Plan Other Employee Costs - 6008

Estimate any additional labor costs. These will impact your budget in 6008

MPIP Insurance

Overtime and Special Payments

Overload jobs continuing into FY27

Hazard Pay



Plan

Use Cognos Reports from Step 2: Reports to consider total employee costs

Position Roster,
Longevity, and
Fringe Estimate

Running this by FOP
can help estimate
fringe and longevity
costs

Salary Increases

It will include all
items entered in
the equity column

SM Fluctuation
Estimate

FY27 will need
budget in 6006.



Plan

Use the information from reports pulled from the Pre-Prep Checklist to help build FY27 Revenue and Expense Budget.

Budget Development Detail with YTD Activity

Compares actual spending to the proposed budget in Budget Development.

Variance Report

Compares proposed budget to actual expenditures for the last full fiscal year and/or the estimated annualized expenditures for the current year

Transfer Roster

Evaluate transfers in or out of your funds



Plan for New Funds/Orgns

Request them now with a current effective date
to use in Budget Prep

Fund Maintenance System

Link in F&A Work Tools tab under Business Affairs>Accounting Services Home

Organization Code Request

Link in F&A Work Tools tab under Budget





QUESTIONS?

Enter Updated Salaries

Input salary adjustments first

- Equity and faculty promotions
- Enter reclass salary changes
- Enter optional merit

Update labor distribution

- Job labor distribution (employee labor) for Pooled positions
- Copy position labor distribution to job labor for Single positions

Update
vacant
positions

E-mail Budget to
update salary totals on
pooled positions

Budget Prep System Location

TTU HSC WebRaider

My Personal Information

Home

Employee

Available Budget

F&A Work Tools

Payroll & Tax

Supervisor

My Content

Cognos

Facilities & Safety

News

F&A Work Tools

HSC / F&A Work Tools

Personnel Action Not...

Preferences

Employee Type of Change

Create New PAF

Budget

Budget Home

- Reports
- Budget Basics Reference Guide
- Budget Revision System
 - Budget Revision System User's Guide
- Organization Code Request
 - Organization Request Instructions
- Fringe Projector
 - DMFR Fringe Calculator Instructions
- Labor Redistribution
 - Labor Redistribution User's Guide
- Approval Tracking System(ATS)
- Budget Office Contact List
- Budget Office Mailbox
- Budget Prep System
 - Budget Prep User's Guide
- Budget Prep Security (Team App)
 - Setting Budget Prep Security

Human Resources

Human Resources Homepage

- **Careers at Texas Tech – All Job Opportunities**
- COVID-19 Homepage
- EOPS (Employee One-time Payment System)

Enter – New System Budget Prep Menu

[Mince](#) » [Budget Prep Menu](#)

Budget Prep Menu

Budget Development Quick Update
FOP selection for Quick Update

Query Budget Development
Query Budget Development data for a specified phase and FOP

Update Budget Development
Update Budget Development data for a specified phase and FOP

Lock Budget Development
Lock or unlock update to Budget Development Transfers

> Update Budget Transfers
[Update Transfers In and Transfers Out for a specified phase and FOP.](#)

> Budget Prep Security(Team)
[Add or remove user security to Budget Prep. managers have the ability to perform this function.](#)

TTU/TTUS Salary Planner Menu
[Salary Planner](#)

HSC Salary Planner Menu
[Salary Planner](#)

HSC-El Paso Salary Planner Menu
[Salary Planner](#)

> Budget Prep Reports
[View Budget Development and Salary Planner](#)

[Employee Dashboard](#) » [Salary Planner](#)

Salary Planner

Edit Scenario
Allows Salary Planner users to edit existing scenarios.

Copy Scenario
Allows Salary Planner users to copy data from one scenario to another.

Organization Lock
Allows Salary Planner users to check the lock status of an organization.

Query Multiple Extracts
Allows Salary Planner users to select multiple Budget Extract IDs for combined viewing.

Finance Budget Development
Allows access to the Finance Budget Development module in Finance Self-Service.

[Employee Dashboard](#) » [Salary Planner](#) » [Edit Scenario](#)

Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID: HSC FY 2027 Extract

Scenario: H27SAL

Filter Criteria

☒ **By Position Attributes** ☐ **By Employee Name**

Select

[Copy Scenario](#) » [Organization Lock](#) » [Query Multiple Extracts](#)

Enter – New System Employee Dashboard

[Employee Dashboard](#)

Employee Dashboard

[My Profile](#)

[My Team](#)

Leave Balances as of 02/16/2026

Vacation in hours

Sick Leave in hours

Holiday Comp in hours

Full Leave Balance Information

Pay Information

Latest Earnings Statement: 02/02/2026 All Earnings Statements Direct Deposit Information Deductions History

Earnings

Taxes

Job Summary

Employee Summary

My Activities

Enter Leave Report

Approve Time

Approve Leave Report

Electronic Personnel (EPAF)

Salary Planner

HSC Labor Redistrib

HRIS Confidentiality

New Employee Pers (EPAF)

[Employee Dashboard](#) » [Salary Planner](#)

Salary Planner

Edit Scenario

Allows Salary Planner users to edit existing scenarios.

Copy Scenario

Allows Salary Planner users to copy data from one scenario to another.

Query Multiple Extracts

[Employee Dashboard](#) » [Salary Planner](#) » [Edit Scenario](#)

Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID:

Scenario:

Filter Criteria

☒ By Position Attributes ☐ By Employee Name

Select

[Copy Scenario](#) » [Organization Lock](#) » [Query Multiple Extracts](#)

Enter – Salary Planner to Budget Prep Menu

[Employee Dashboard](#) » [Salary Planner](#)

Salary Planner

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Budget Prep Menu

Allows access to the Finance Budget Development module in Finance Self-Service.

[My Finance](#) » [Budget Prep Menu](#)

Budget Prep Menu

Budget Development Quick Update

FOP selection for Quick Update

Query Budget Development

Query Budget Development data for a specified phase and FOP

Update Budget Development

Update Budget Development data for a specified phase and FOP

Lock Budget Development

Lock or unlock update to Budget Development and Budget Transfers

> Update Budget Transfers

[Update Transfers In and Transfers Out for a specified phase and FOP](#)

> Budget Prep Security(Team)

[Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.](#)

TTU/TTUS Salary Planner Menu

[Salary Planner](#)

HSC Salary Planner Menu

[Salary Planner](#)

HSC-EI Paso Salary Planner Menu

[Salary Planner](#)

> Budget Prep Reports

[View Budget Development and Salary Planner reports.](#)

Enter

Do Not
Select
Multiple/
Higher Level
Orgns!

Click on an Employee
Name to Update or View
the employee's
information

SELECT ONE
ORGN AT A
TIME

Changes in salary will be
entered on another screen

List By Employee

Department Orgn and Name

ID and Name	Position, Suffix and Title	Employee FTE Totals	Employee Salary Totals	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded From Totals
R12345678 Marsha Mellow	H95238 - 00 Specialist IV	1	34,342.12	1	1	34,342.12	0.00	0.00	34,342.12		No
R12345786 Bonnie Ann Clyde	H95238 - 00 Specialist IV	1	38,065.46	1	1	38,065.46	0.00	0.00	38,065.46		No
R12345687 Ella Vator	H92334 - 00 Unit Manager	1	53,500.06	1	1	53,500.06	0.00	0.00	53,500.06		No
Total		3		3	3	125,907.64	0.00	0.00	125,907.64		

Employee Dashboard » Salary Planner » Position Filters

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

Update of Budget Development

Chart of Account: H
Budget ID: H2027
Budget Phase: H27DPT
H2027, H27SAL

Organization:

X 204010 - General Services Code

Include Subordinate Organizations:

Employee Class:

X All

Include Pooled Positions

Include Vacant Positions

List By Employee

Summary Totals

List By Position

Enter – New Process Increases

ENTER
EQUITY,
SAVE. ENTER
MERIT,
SAVE.

Enter salary adjustment
into Equity column

Employee Detail

Employee Name and ID

Home Organization

SAVE.

Enter salary adjustment into Equity column

Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Rate	Proposed Rate	Base Salary	Equity Percent	Equity Amount	Merit Percent	Merit Amount	Proposed Salary	Links	Exclude from Totals
		1	1.000	16.250000	16.250000	33,801.30	0.00	0.000000	0.00	0.000000	33,801.30	Distribution Comments	☐
Total		1	1	16.250000	16.250000	33,801.30	0.00	0.00	0.00	0.00	33,801.30		

Extract Totals									
Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary			
	1	1				0.00			33,801.30
T	1	1				0.00			33,801.30

Enter a Merit in Merit Column

Save

SAVE IN BETWEEN EACH ENTRY

Enter - Comments

Employee Detail

Employee Name and ID

Home Organization

Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Rate	Proposed Rate	Base Salary	Equity Percent	Equity Amount	Merit Percent	Merit Amount	Proposed Salary	Links	Exclude from Totals
		1	1.000	17.500000	17.500000	36,401.40	0.00	0.000000	0.00	0.000000	36,401.40	Distribution Comments	☐
Total		1	1	17.500000	17.500000	36,401.40	0.00	0.00	0.00	0.00	36,401.40		

Extract Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
		1	1	36,401.40	0.00	0.00
Total		1	1	36,401.40	0.00	0.00

Save

Reset

Previous

Next

List By Employee

List By Position

Position Filter

Summary Totals

Job Comments

Name and ID

Position-Suffix and Title:

Last Updated by:

Lance Grady Lankford

Last Updated on:

12/03/2025

Comments

Add Comments

Remaining Characters : 1300

Save

Enter Comments for Salary Adjustments!

Comment details for amount entered in Equity Column.

Enter: New Process for Labor Change - Single

Update Employee Labor for Single Positions

[Employee Dashboard](#) » [Salary Planner](#) » [Edit Scenario](#)

Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID:

MSC FY 2027 Extract

Scenario:

H27SAL

Filter Criteria

☒ By Position Attributes ☐ By Employee Name

Select

[Copy Scenario](#)

[Employee Dashboard](#) » [Salary Planner](#) » [Position Filters](#)

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

Update of Budget Development

Chart of Account: H

Budget ID: H2027

Budget Phase: H27DPT

H2027, H27SAL

Organization:

X All Organization

Include Subordinate Organizations: ☒

Employee Class:

X All

Include Pooled Positions ☒

Include Vacant Positions ☒

[List By Employee](#)

[Summary Totals](#)

[List By Position](#)

[Employee Dashboard](#) » [Salary Planner](#) » [List By Position](#)

List By Position

Update of Budget Development

Chart of Account: H

Budget ID: H2027

Budget Phase: H27DPT

[Jump To Bottom](#)

794140 - Organization Lbk, Unlocked

Position and Title	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Estimated Fiscal Year Budget	Links	Extra Stat	Exclude from Totals
H83202	0.98	0.9800	30,578.40	0.00	0.00	30,578.40		30,578.40	Distribution Comments Employee		☐
H83416	1.00	1.0000	31,201.20	0.00	0.00	31,201.20		31,201.20	Distribution Comments Employee		☐
H83638	1.00	1.0000	81,000.00	0.00	0.00	81,000.00		81,000.00	Distribution Comments Employee		☐
H83639	1.00	1.0000	83,533.00	0.00	0.00	83,533.00		83,533.00	Distribution Comments Employee		☐
H83640	1.00	1.0000	48,000.00	0.00	0.00	48,000.00		0.00	Distribution Comments Employee		☐

Enter: New Process for Labor Change - Single

Update
Employee Labor
for Single
Positions – List
by Position

[Employee Dashboard](#) • [Salary Planner](#) • [Position Distribution](#)

Position Distribution

Select the Percent link to change the proposed position budget distribution. Select Add a New Record to add distribution records.

Update of Budget Development

Chart of Account: H
Budget ID: H2027
Budget Phase: H27DPT
Budget Distribution for Position H83416 Intern

Total Labor = 100%

Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
H		131094	514102	612506	35					100.00	31,201.20
Total										100.00	31,201.20

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
H		131094	514102	612506	35					100.00	31,201.20
Total										100.00	31,201.20

Proposed Job Distribution

Current Incumbent

Name and ID:
Position-Suffix and Title: H83416-00 Intern

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Encumbrance Override End Date
H		131094	514102	612506	35					100.00	31,201.20	
Total										100.00	31,201.20	

[Copy Position Distribution to Jobs](#)

Click to avoid additional work. Ensures that both the position and job are funded from the same FOPs

Click to add additional FOPs

Click on the percent to adjust the current FOP

[List By Employee](#) • [List By Position](#) • [Summary Totals](#)

Enter: New Process for Labor Change - Pooled

Update Employee Labor for Pooled Positions

[Employee Dashboard](#) » [Salary Planner](#) » Edit Scenario

Edit Scenario

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID:

Scenario:

Filter Criteria

☒ By Position Attributes ☐ By Employee Name

[Select](#)

[Copy Scenario](#) » [Org](#)

[Employee Dashboard](#) » [Salary Planner](#) » Position Filters

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

Update of Budget Development

Chart of Account: H

Budget ID: H2027

Budget Phase: H27DPT

H2027, H27SAL

Organization:

Include Subordinate Organizations:

Employee Class:

Include Pooled Positions

Include Vacant Positions

[List By Employee](#) [Summary Totals](#) [List By](#)

[Employee Dashboard](#) » [Salary Planner](#) » List By Employee

List By Employee

Organization Lbk, Unlocked

ID and Name	Position, Suffix and Title	Employee FTE Totals	Employee Salary Total	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded From Totals
	H83202 - 00 Graduate Assistant	0.49	15,289.20	0.49	0.49	15,289.20	0.00	0.00	15,289.20		No
	H83202 - 00 Graduate Assistant	0.49	15,289.20	0.49	0.49	15,289.20	0.00	0.00	15,289.20		No
Total		4.98	4.98	304,312.60	0.00	0.00	304,312.60				

Click on the person in the pooled position to update their distribution

Enter: New Process for Labor Change - Pooled

Update Employee Labor for Pooled Positions – List by Employee

[Employee Dashboard](#) • [Salary Planner](#) • [Employee Detail](#)

Employee Detail

Employee

Name and ID

Home Organization

- Organization Lbk

Organization Lbk

Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Rate	Proposed Rate	Base Salary	Equity Percent	Equity Amount	Merit Percent	Merit Amount	Proposed Salary	Links	Exclude from Totals
H83202-00 Graduate Assistant	- Organization Lbk	0.49	0.490	15.000000	15.000000	15,289.20	0.00	0.000000	0.00	0.000000	15,289.20	Distribution Comments	☐
Total		0.49	0.49	15.000000	15.000000	15,289.20	0.00	0.00	0.00	0.00	15,289.20	1. Employee Dashboard - Salaries	

Extract Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount
- Organization Lbk	0.49	0.49	15,289.20	0.00	0.00
Total	0.49	0.49	15,289.20	0.00	0.00

[Save](#) [Reset](#) [Previous](#) [Next](#)

[List By Employee](#) • [List By Position](#) • [Position Filter](#) • [Employee Filter](#) • [Summary Totals](#)

[Employee Dashboard](#) • [Salary Planner](#) • [Job Labor Distribution](#)

Job Labor Distribution

Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

LABOR = 100%

Distribution Name and ID

Position-Suffix and Title
H83202-00 Graduate Assistant

EPAF Transaction #

Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Encumbrance Override End Date
H		131094	514102	614401	35					100.00	15,289.20	
Total										100.00	15,289.20	

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount	Encumbrance Override End Date
H		131094	514102	614401	35					100.00	15,289.20	
Total										100.00	15,289.20	

Click to change FOAP

Add a new record

Click to add an additional FOAP

Proposed Position Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project Type	Cost Type	Percent	Amount
H		131094	514102	614401	35					100.00	30,578.40
Total										100.00	30,578.40

Copy Position Distribution to Job

This will revert FOAP to the Proposed Position Distribution

For single positions only, if you make a change on this Job Labor Distribution screen, you must also update the Position Distribution screen to ensure that Salary Planner and Budget Development are in sync. Please click the link below to access the List by Position page and complete the necessary updates.

[Employee Detail](#)

[List By Employee](#) • [List By Position](#) • [Summary Totals](#)

Enter

List By Position

Update of Budget Development

Chart of Account: H
Budget ID: H2027
Budget Phase: H27DPT

[Jump To Bottom](#)

Update Vacant Positions

Position and Title	Base FTE	Proposed FTE	Base Budget	Change Percent	Change Amount	Proposed Budget	Bargaining Unit	Estimated Fiscal Year Budget	Links	Extract Status	Exclude from Totals
	0.00	0.0000	25,000.00	0.00	0.00	25,000.00		25,000.00	Distribution Comments Employee		☐
	0.98	0.9800	35,654.42	1.40	500.00	36,154.42		18,327.21	Distribution Comments Employee		☐
	0.00	0.0000	0.00	0.00	0.00	0.00		0.00	Distribution Comments Employee		☐
	1.00	1.0000	87,000.00	0.00	0.00	87,000.00		87,000.00	Distribution Comments Employee		☐
	1.00	1.0000	281,190.00	0.00	0.00	281,190.00		281,190.00	Distribution Comments Employee		☐
	0.00	0.0000	10,900.00	0.00	0.00	10,900.00		0.00	Distribution Comments Employee		☐
	1.00	1.0000	55,259.53	0.00	0.00	55,259.53		0.00	Distribution Comments Employee		☐
Total	5.98	5.98	897,203.95	0.07	500.00	897,703.95		813,717.21			

Summary

Results found: 10

[Save](#)

[Return To Top](#)

Remember to SAVE!

[List By Employee](#) • [Summary Totals](#) • [Employee Filter](#) • [Position Filter](#)
[Edit Scenario](#)

HSC
1969

Content

My content

Team content

Samples

[Team content](#) / [Budget](#) / [Budget Prep](#) / [HSC and HSC EL PASO](#) / Step 3: Reports While Working in Budget Prep

☐	Name
☐	020_BUDEV - Fund Summary Report
☐	030_BUDEV - Budget Development Detail Report
☐	030_BUDEV_Y - Budget Development Detail Report with YTD Activity
☐	040_TRNFR - Transfer Roster
☐	045_SPLAN - Salary Roster
☐	047_SPLAN_JLBD Funded from Ending Grants
☐	048_SPLAN - Salary Planner Totals by FOAP
☐	049_SPLAN - Pooled Positions by Job Orgn
☐	050_SPLAN - Position Roster by Employee
☐	060_SPLAN - Position Roster by FOAP

COGNOS: Step 3: Reports while working in Prep

- Helpful while inputting data in budget prep
- Some of the same reports as in step 2
- Others reports to help check data entry and ensure balanced funds

TRANSFER SYSTEM: Update Transfers

Add detail for transfer codes (8001/8002, 8095/8096)



All transfers have 2 sides (In/Out)

Both sides of the transfers must balance



Add new transfers



Edit Existing Transfers



Allocated transfers (worded)

FUF – Facility Use Fee

DEAN – Dean's Support

Enter

TRANSFER SYSTEM: Update Transfers

Texas Tech University System

Banner Budget Transfer System

Transfer Roster

COAS ID: **Texas Tech Univ Health Sciences Ctr**

Budget ID: **HSC FY 2027 Budget** ORGN Codes: **512101 - Dermatology Dept Lbk Genl**

Chart Code: H TX Tech Univ Hlth Sciences Ctr
Fund Code: **131007** Dermatology Dept Program Lbk
Prog Code: **40** Academic Support

Display Roster

☐ HSC FY26 Original Budget ☒ HSC FY26 Dept Request ☐ HSC FY26 Final Budget

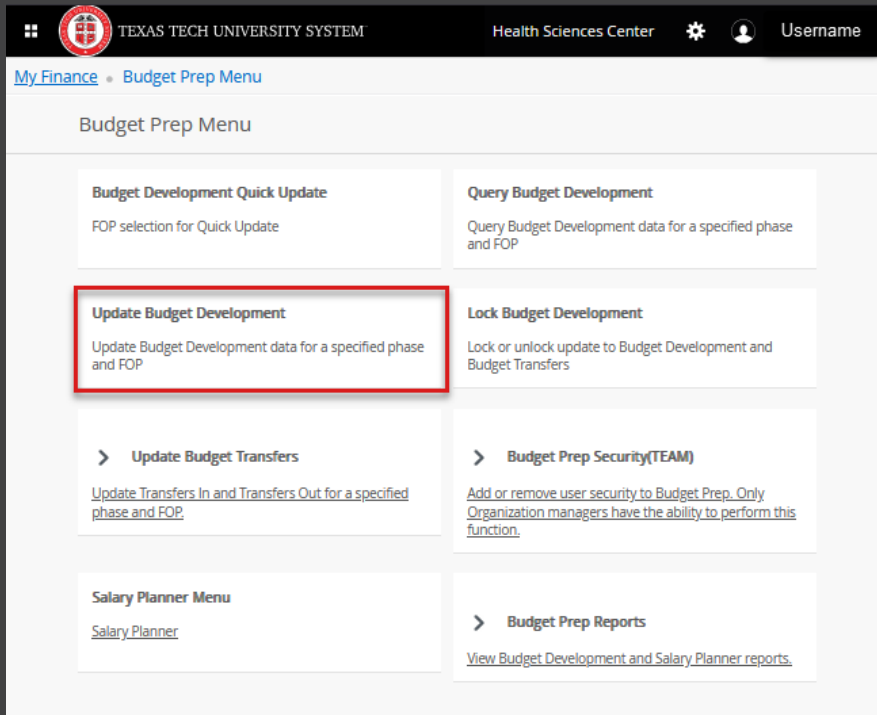
Phase Open

TFR Nbr	This Pool	This Acct	This Amount	Part Pool	Part Fund	Part Orgn	Part Acct	Part Prog	Part Amount
82759	8002	BUSOFF	196,757	8001	None	None	BUSOFF	None	-196,757
82760	8002	CLSPPT	67,688	8001	None	None	CLSPPT	None	-67,688
82761	8002	DEAN	126,865	8001	None	None	DEAN	None	-126,865
82762	8002	EMR	206,735	8001	None	None	EMR	None	-206,735
82763	8002	FUF	21,262	8001	None	None	FUF	None	-21,262
82764	8002	IDF	53,086	8001	None	None	IDF	None	-53,086
82765	8002	IDX	53,601	8001	None	None	IDX	None	-53,601
82766	8002	PRESID	121,354	8001	None	None	PRESID	None	-121,354
82767	8002	PRBLDG	16,891	8001	None	None	PRBLDG	None	-16,891
82768	8002	PRLIAB	9,887	8001	None	None	PRLIAB	None	-9,887
83053	8002	CLRSCH	23,207	8001	None	None	CLRSCH	None	-23,207
83442	8002	CDINTG	35,699	8001	None	None	CDINTG	None	-35,699
83930	8002	PPR	20,120	8001	None	None	PPR	None	-20,120
Total In:			0				Total In:		
Total Out:			953,152				Total Out:		

Only make
changes to
your FOAP.

Enter

BUDGET DEVELOPMENT SYSTEM: Set Up for New User



TEXAS TECH UNIVERSITY SYSTEM Health Sciences Center Username

[My Finance](#) • [Budget Prep Menu](#)

Budget Prep Menu

Budget Development Quick Update
FOP selection for Quick Update

Update Budget Development
Update Budget Development data for a specified phase and FOP

Query Budget Development
Query Budget Development data for a specified phase and FOP

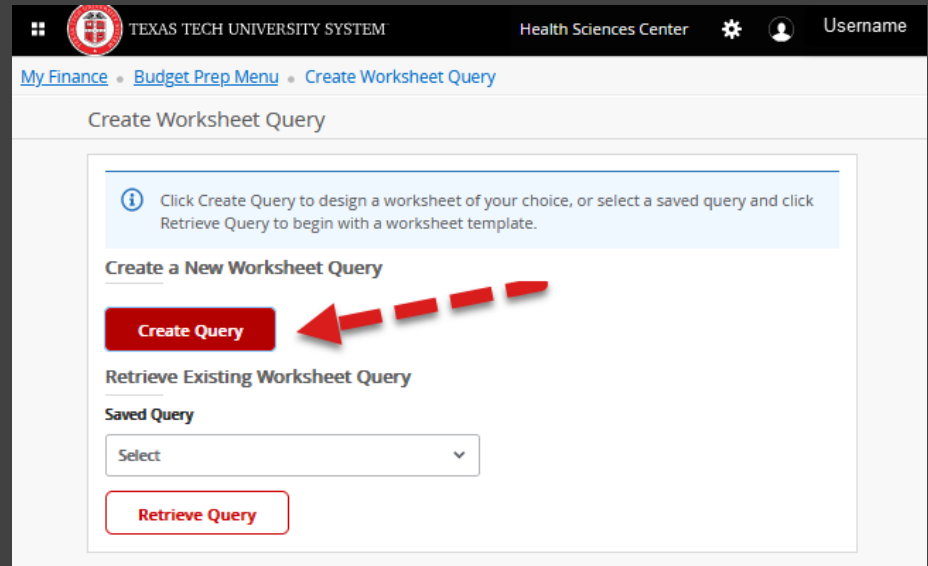
Lock Budget Development
Lock or unlock update to Budget Development and Budget Transfers

Update Budget Transfers
[Update Transfers In and Transfers Out for a specified phase and FOP.](#)

Budget Prep Security(Team)
[Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.](#)

Salary Planner Menu
[Salary Planner](#)

Budget Prep Reports
[View Budget Development and Salary Planner reports.](#)



TEXAS TECH UNIVERSITY SYSTEM Health Sciences Center Username

[My Finance](#) • [Budget Prep Menu](#) • [Create Worksheet Query](#)

Create Worksheet Query

Click Create Query to design a worksheet of your choice, or select a saved query and click Retrieve Query to begin with a worksheet template.

Create a New Worksheet Query

Create Query

Retrieve Existing Worksheet Query

Saved Query

Select

Retrieve Query

Enter

BUDGET DEVELOPMENT SYSTEM: Set up for New User

TEXAS TECH UNIVERSITY SYSTEM Health Sciences Center Username

[My Finance](#) • [Budget Prep Menu](#) • [Create Worksheet Query](#)

Create Worksheet Query

Select the detail base budget columns to display when the budget source includes base budget amounts from a prior Operating Ledger budget.

- ☒ Adopted Budget
- ☒ Permanent Budget Adjustments

[Continue](#)

TEXAS TECH UNIVERSITY SYSTEM Health Sciences Center Username

[My Finance](#) • [Budget Prep Menu](#) • [Create Worksheet Query](#)

Create Worksheet Query

Fund and Organization codes must be specified. Program and Account may use specific codes, parameter entry with wildcard %, or may be left blank or use % parameter for All...

Chart of Accounts *

H

Budget ID *

H2027

Budget Phase *

H27DPT [Look up](#)

Fund *

241746

Organization *

281001

Program

Check to Include

- ☒ Revenue Accounts
- ☒ Labor Accounts
- ☒ Expenses
- ☒ Transfers
- ☐ Deleted Items

Save Query as

[Submit](#)

☐ Shared

BUDGET DEVELOPMENT SYSTEM: Update Budgets

Revenue Entry

- Update Revenue Codes and add justifications to avoid future questions from analyst

Personnel Expenses

- Faculty, Staff, Student (6001, 6002, 6003,) feeds from Salary Planner
- Longevity, Fringe Benefits (6005, 6007) – Dept Input
- Other salary (6004, 6008, 6009) – Dept Input

Operating Expenses

BAC	Acct Title	BAC	Acct Title
7010	M&O	7020	In State Travel
7017	Communications	7033	Professional Liability
7019	Subscriptions	7035	Food & Entertainment

Enter

My Finance

Budget Prep Menu

Budget Prep Menu

Budget Development Quick Update

FOP selection for Quick Update

Update Budget Development

Update Budget Development data for a specified phase and FOP

Update Budget Transfers

Update Transfers In and Transfers Out for a specified phase and FOP

TTU/TTUS Salary Planner Menu

Salary Planner

HSC-EI Paso Salary Planner Menu

Salary Planner

Query Budget Development

Query Budget Development data for a specified phase and FOP

Lock Budget Development

Lock or unlock update to Budget Development and Budget Transfers

Budget Prep Security(Team)

Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.

HSC Salary Planner Menu

Salary Planner

Budget Prep Reports

View Budget Development and Salary Planner reports.

New Year, New Budget ID
and Budget Phase:
Budget ID – H2027
Budget Phase – H27DPT

BUDGET DEVELOPMENT SYSTEM: Update Budgets

My Finance

Budget Prep Menu

My Worksheets

Add Worksheet

Click the List Worksheets button if necessary to display your available worksheet choices for the selected Budget ID and Budget Phase. Select a Worksheet and click the Submit button to open the Worksheet....

Chart of Accounts *

Budget ID *

Budget Phase *

H

H2027

H27DPT

Look up

List Worksheets

Query Results 10

My Choice	Fund	Organization	Program
☐	101065 Inst Compliance	60 Institutional Support	
☐	101065 Inst Compliance	60 Institutional Support	
☐	101065 Inst Compliance	60 Institutional Support	
☐	181031 Billing Compliance Program Lbk	40 Academic Support	
☐	181031 Billing Compliance Program Lbk	40 Academic Support	
☐	181111 Inst Compliance	60 Institutional Support	
☐	181111 Inst Compliance	60 Institutional Support	
☐	181111 Inst Compliance	60 Institutional Support	
☐	182040 Billing Compliance Program Ama	40 Academic Support	
☐	184007 Billing Compliance Program Ode	40 Academic Support	

Submit

Select a radio
button to view
worksheet and
click submit.

Enter

BUDGET DEVELOPMENT SYSTEM: Update Budgets

[My Finance](#) • [Budget Prep Menu](#) • [Create Worksheet Query](#) • [Account Detail](#)

Click POST
to save data

The Budget Development Worksheet allows you to calculate a mass change for all budget lines and/or change individual line items. Mass change requires a specific change value. All change values are incremental adjustments and can be positive or negative. Budget lines can be added or deleted...

Worksheet Parameters

Worksheet **17**

Query

Calculate

Post

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Base Budget	Budget Duration	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		60		Institutional Support										
			5Z	Budget Acct - Revenue										
OPAL	N		5018	Supplies and Services	30,000.00	0.00	30,000.00	P	30,000.00		☐	0.00	30,000.00	☐
OPAL	N		5099	Fund Balance	193,000.00	0.00	193,000.00	P	193,000.00		☐	0.00	193,000.00	☐
			6Z	Budget Acct - Salaries and Wages										
SALP	N		6002	Staff Salaries	201,213.00	0.00	201,213.00	P	201,213.00		☐	0.00	201,213.00	☐
OPAL	N		6005	Longevity	1,224.00						☐	0.00	1,224.00	☐
OPAL	N		6007	Payroll Related Costs	44,559.00	0.00	44,559.00	P	44,559.00		☐	0.00	44,559.00	☐

Add justification -
Required for Fund
Balance (5099)

No Cents! Whole Dollars Only

Input amount of the change

Clicking on the account code will pop-up a box to add text. Please use this to communicate exceptions or changes to your budget analyst.

Enter - *UPDATED*

BUDGET DEVELOPMENT SYSTEM: Add a New Worksheet (New FOP)

My Finance

Budget Prep Menu

Budget Prep Menu

Budget Development Quick Update

FOP selection for Quick Update

Update Budget Development

Update Budget Development data for a specified phase and FOP

Update Budget Transfers

Update Transfers In and Transfers Out for a specified phase and FOP

Salary Planner Menu

Salary Planner

Query Budget Development

Query Budget Development data for a specified phase and FOP

Lock Budget Development

Lock or unlock update to Budget Development and Budget Transfers

My Finance

Budget Prep Menu

Create Worksheet Query

Create Worksheet Query

Click Create Query to design a worksheet of your choice, or select a saved query and click Retrieve Query to begin with a worksheet template.

Create a New Worksheet Query

Create Query

Retrieve Existing Worksheet Query

Saved Query

Select

Retrieve Query

My Finance

Budget Prep Menu

Create Worksheet Query

Create Worksheet Query

Select the detail base budget columns to display budget amounts from a prior Operating Ledger

Adopted Budget

Permanent Budget Adjustments

Continue

My Finance

Budget Prep Menu

Create Worksheet Query

Create Worksheet Query

Fund and Organization codes must be specified. Program and Account may use specific codes, parameter entry with wildcard %, or may be left blank or use % parameter for All....

Chart of Accounts

H

Budget ID

H2027

Budget Phase

H27DPT

Look up

Fund

241746

Organization

281001

Program

30

Check to Include

Revenue Accounts

Labor Accounts

Expenses

Transfers

Deleted Items

Save Query as

Shared

Submit

Enter Fund, Orgn, and Program

Enter

BUDGET DEVELOPMENT SYSTEM: Add a New Budget Account Code/New Row

The screenshot shows a web-based budget development system interface. It features a table with columns: New Row, Program, Account, Budget Duration, and Proposed Budget. Row 1 is populated with Program 60, Account 7050, Budget Duration Permanent Budget, and Proposed Budget 1000. Row 2 is partially populated with Program 60 and Budget Duration Permanent Budget. Below the table are buttons for '+ Add Row', 'Requery', 'Calculate', and 'Post'. Annotations with arrows point to specific elements: 'Enter new acct code to add' points to the Account field in Row 1; 'Defaults permanent' points to the Budget Duration field in Row 1; 'Enter amount needed' points to the Proposed Budget field in Row 1; 'Add row for additional Acct codes' points to the '+ Add Row' button; and 'Post to add to your worksheet' points to the 'Post' button.

New Row	Program	Account	Budget Duration	Proposed Budget
1	60	7050	Permanent Budget	1000
2	60		Permanent Budget	

+ Add Row

Requery Calculate Post

Enter new acct code to add

Defaults permanent

Enter amount needed

Add row for additional Acct codes

Post to add to your worksheet

Enter

BUDGET DEVELOPMENT SYSTEM: View History

Who made a change?

201,213.00	
1,224.00	

Click on colored
proposed amounts
to view history

Budget Development History

Worksheet Parameters

Chart of Accounts	H	Texas Tech Univ Health Sciences Ctr
Budget ID	H2027	HSC FY 2027 Budget
Budget Phase	H27DPT	HSC FY27 Dept Request
Fund	189876	HSC Fund Lbk
Organization	998877	HSC Orgn Lbk
Account	7010	Maintenance and Operations
Program	60	Institutional Support
Activity	-	-
Location	-	-
Duration Code	-	-

Query Results

User ID	Date	Time	Prior Proposed Budget	Change Amount	New Proposed Budget	Delete
XXP960	Feb 24, 2026	16:46 pm	28,633.00	(2,000.00)	26,633.00	N



QUESTIONS?

Budget Prep Final Checklist

The final review checklist is another tool to ensure that all items have been addressed.

Check off
items
verifying:

- Previous steps have been completed
- Fund balance use has been justified
- Comments for changes in revenue have been entered and justifications have been submitted by e-mail for practice plan funds to appropriate personnel.
- Reports have been ran and cleared of data.
 - Run all Cognos Step 4 reports
- Budgets and transfers are **balanced**
- Targets are met
- Lock Salary Planner and Budget Dev
- Notify next level budget prep approver



Budget Prep Final Checklist

Running Cognos Step 4 Reports

- Are all salary adjustments inputted?
- Did I budget enough fringe/longevity?
- Did I account for SM fluctuation in hours?
- Are my employees funded 100%?
- Did I budget cents?
- Are my transfers in balance?
- Did I justify my use of fund balance?
- Do I have any funds out of balance?



Budget Prep Final Checklist

Report - Step 4:
410_BUDDEV
Revenue
Justification

- Report requirement for **All Practice Plan** funds
- Complete the document with detailed justification
 - New Contracts, Loss/Decrease Contracts
 - New Faculty, Loss of Providers
 - Increase/Decrease Patient Volume
- For Medical Practice Plans, e-mail the completed form to hscbud@ttuhsc.edu and cc:
 - Lubbock – Bowie McGinnis, Javier Delgado, Lacey Hendricks, and Shalene Vineyard
 - Amarillo – Cari Neeley
 - Odessa – Kory Smith
- For FY27, all other Practice Plans e-mail reports to hscbud@ttuhsc.edu



Verify Salary Planner Lock Screen

Salary Planner

Create Scenario

Allows the Master Salary Planners to create scenarios.

Edit Scenario

Allows Salary Planner users to edit existing scenarios.

Copy Scenario

Allows Salary Planner users to copy data from one scenario to another.

Organization Lock

Allows Salary Planner users to check the lock status of an organization.

Query Multiple Extracts

Allows Salary Planner users to select multiple Budget Extract IDs for combined viewing.

Budget Prep Menu

Allows access to the Finance Budget Development module in Finance Self-Service.

Employee Dashboard • Salary Planner • Organization Lock Selection

Organization Lock Selection

Select an Extract ID and Scenario. Select the Lock Status All to display Organizations regardless of status Organization.

Extract ID:

HSC FY 2027 Extract

Scenario:

H27SAL

Lock Status:

Unlocked

Organization

Submit

To lock all organization codes you have security for, choose lock status Unlocked and leave Organization field blank.

Verify Salary Planner Lock Screen

New Report located in Budget Prep Step 5 folder

430_SPLAN – Salary Planner Orgn Lock

Report shows the lock status of an orgn from level 2 to 6.

Example below:

Red highlight indicates that orgn level is locked. Any orgn after that level is locked as well.

Orgn Level 2	Orgn Level 3	Orgn Level 4	Orgn Level 5	Orgn Level 6	Orgn Level 7
H70 – Raider Division	H707 - Raider Lbk	7070 - Raider Lbk	70700 - Raider Lbk	707000 - Raider Lbk	707007 - Raider Lbk
					707029 - Raider Red Lbk
					707037 - Raider Black Lbk

In this example, orgn Levels 5, 6 and 7 are locked.

Verify Budget Development Lock Screen

[My Finance](#) » [Budget Prep Menu](#)

Budget Prep Menu

Budget Development Quick Update FOP selection for Quick Update	Query Budget Development Query Budget Development data for a specified phase and FOP
Update Budget Development Update Budget Development data for a specified phase and FOP	Lock Budget Development Lock or unlock update to Budget Development and Budget Transfers
> Update Budget Transfers Update Transfers In and Transfers Out for a specified phase and FOP.	> Budget Prep Security(Team) Add or remove user security to Budget Prep. Only Organization managers have the ability to perform this function.
TTU/TTUS Salary Planner Menu Salary Planner	HSC Salary Planner Menu Salary Planner
HSC-EI Paso Salary Planner Menu Salary Planner	> Budget Prep Reports View Budget Development and Salary Planner reports.

[My Finance](#) » [Budget Prep Menu](#) » [Organization Lock](#)

Organization Lock

i Chart, Budget ID, and at least one Phase are required. Click the Default Phases button to retrieve default phases for a Budget ID, or use phase lookup. Choos... [v](#)

Chart of Accounts *	Budget ID *	Default Phases
H	H2027	
Phase 1	Phase 2	
H27DPT	Select	
Phase 3	Current Status *	
Select	All	
Organization		
Select		
Submit		

Verify Budget Development Lock Screen

My Finance • Budget Prep Menu • Organization Lock • Lock Status

Parameters

 Select the Change Status checkbox to designate Organizations and their successors for a change in lock status. Click Review to see the subset of records marked for...

Organization Lock Status **4**

Organization	Title	HSC FY27 Dept Request Current Status	Change
000000	HSC ORGN LBK 1	Unlocked	☐
012345	HSC ORGN LBK 2	Unlocked	☐
023456	HSC ORGN LBK 3	Unlocked	☐
034567	HSC ORGN LBK 4	Locked	☐

Review

Update

My Finance • Budget Prep Menu • Organization Lock • Lock Status

Parameters

 Select the Change Status checkbox to designate Organizations and their successors for a change in lock status. Click Review to see the subset of records marked for...

Organization Lock Status **4**

Organization	Title	HSC FY27 Dept Request Current Status	Change
000000	HSC ORGN LBK 1	Unlocked	☐
012345	HSC ORGN LBK 2	Unlocked	☐
023456	HSC ORGN LBK 3	Unlocked	☒
034567	HSC ORGN LBK 4	Locked	☐

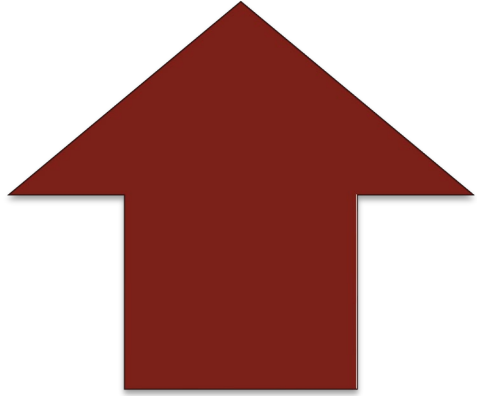
Review

Update

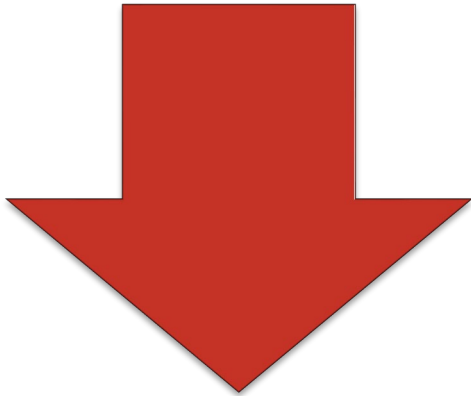
MORE BUDGET



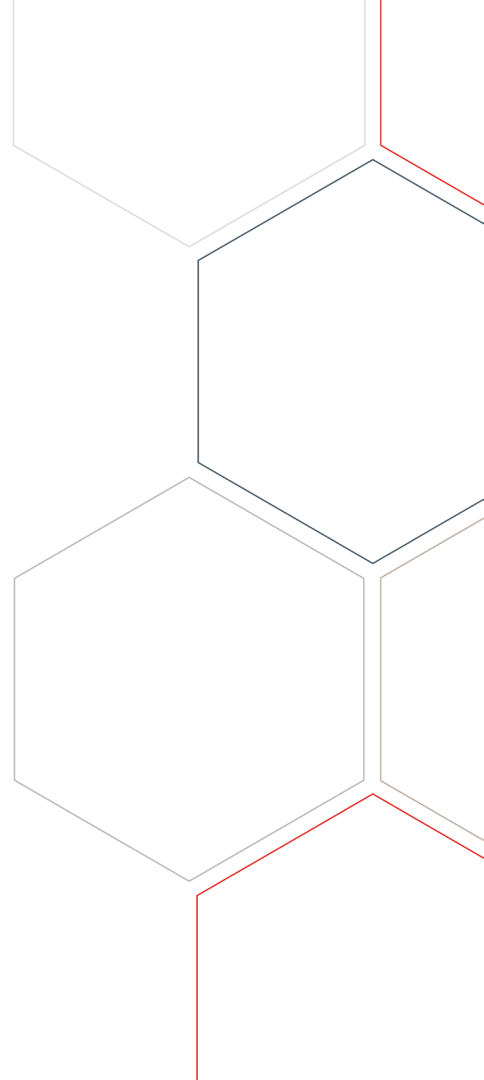
Fund Allocation



E&G funds must be
funded within the
E&G targets



All local funds must
be budgeted in FY27
Operating Budget



Fund Allocation – Multi Year

Multi- year funds must be covered via a budget revision after remaining balances are rolled to FY27 (After September 11th)

Labor changes can be entered in Salary Planner if new funds have been set up

You must work with Accounting to request new fund numbers and for grant renewals and extensions

Submit Current and Future Labor Change ePAFs in September if new funds are not set up during the budget cycle.

Actions within Budget Prep System

Establish Budget

- Revenue
- Expenditures
- Salaries
- Transfers

Modify Salaries

- Input equity adjustments
- Input reclass adjustments
- Input Merit
- Adjust secondary position salaries (corresponding salary review)

Change Employee Funding

Locking

Outside of Budget Prep System

Vacate a position

An ePAF must be submitted to terminate the employee

Create a new position

Submit a New Position PASS transaction to HR by May 22nd

Reclassify a position

Submit a Reclass PASS transaction to HR by May 22nd

Close a Position

Submit a Close Position Form.



**Do NOT use the
BACK button on
your browser**



**Utilize Cognos
Reports**



**Review and follow
instructions in the
User Guide**



Call the Budget Office

E-mail and Zoom
chats are great too!

System Tips

Office of Budget and Resource Planning

Home > Budget

≡ Budget

Budget Home

Cognos Reports

▼ Resources

Systems, Instructions & Information

[F&A Newsletters](#)

TTUHSC Operating Budget

Other Helpful Links

Contact Us

Systems, Instructions and Information

Budget Systems and Guides

Budget Reference Materials

Budget Prep Materials

Budget Prep System ⇅

[Pre-Budget Prep Checklist](#)

[Final Budget Prep Checklist](#)

[Budget Prep Quick Start Guide](#)

[Budget Prep User Guide](#)

[Budget Guidelines FY2026](#)

[Budget Prep System Training FY2026](#)

Budget Prep Security (Team App) ⇅

[Setting Budget Prep Security](#)

To be published;
“Budget
Guidelines
FY2027” that will
include important
dates and this
training.

Budget Tools/Resources



Shana Haney

806-743-1207

H10 – President

H12 -
Chancellor

H15 - Excellence
& Culture



Fabiola Haro

806-743-3617

H14 - Institutional
Compliance

H17 - IT

H21 - Human
Resources

H30 - School of
Health Professions

H544 - SOM
Odessa



Lucas Hendrix

806-743-9470

H25 - Provost

H28 - School of
Population &
Public Health

H35 - School of
Nursing

H522 - SOM
Amarillo



Emily Hinojos

806-743-4092

H11 - External
Relations

H20 - Finance

H23 – Office of
the COO

H99 -
Institutional



Lance Lankford

806-743-1131

H27 – Research

H511 – SOM
Lubbock



Thomas Mowery

806-743-2217

H13 - Rural
Affairs

H22 - Facilities

H26 - GSBS

H40 - School of
Pharmacy

H69 - Strategic
Initiatives



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HEALTH SCIENCES CENTER™



IF YOU HAVE ANY QUESTIONS
PLEASE CONTACT US:

MAIN BUDGET OFFICE PHONE NUMBER: (806)743-7717

BUDGET OFFICE E-MAIL: hscbud@ttuhsc.edu



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