

The following two Banner web-based tools will be used for developing your unit's overall budget:

- **Finance Budget Development Tool** - to enter changes to their new fiscal year operating budget.
- **HR Salary Planner Tool** - to enter annual salary and account changes for budgeted positions and associated job records. In addition, job title and FTE changes for Academic positions may be entered (with supporting documentation and approval). Civil Service job title and FTE changes must be processed through the Central HR offices.

The Position Budget Profile codes in Banner are an essential part of this process. They are used to select positions and associated jobs for the Salary Planner extract and scenarios. **At this time, units are asked to review Budget Profile codes assigned to positions for accuracy as it relates to the upcoming budget process.**

To accomplish this task, you will access a Position Budget Profile Code Audit report showing all positions in "budget eligible" E-Classes for your unit. This report is available at [http://www.hr.uillinois.edu/reporting\\_portal/hr\\_reports](http://www.hr.uillinois.edu/reporting_portal/hr_reports). Select the "Budget Profile" link under Operational Reporting and login with your Enterprise ID and password to access the report. The report reflects Banner position and job information as of the date the report is pulled.

**Any necessary changes and updates to the Budget Profile codes for positions to be included in the "practice" version of the Salary Planner must be made processed via the HR Front End by 5:00 PM on May 5, 2017.** At that time, the "practice" version of the Salary Planner extracts and scenarios will be created for units. Any necessary changes and updates to the Budget Profile codes for positions to be included in the "production" version of the Salary Planner must be made in HRFE before the production extracts are run. Production extracts are scheduled to be available on June 27, 2017.

Once the production extracts are created, only the following changes in Banner **WILL appear** in Salary Planner via the Add/Delete process:

- **New** positions and jobs will be added to the extract, providing they meet selection criteria.
- Terminated jobs and positions will be removed.
- Positions with Budget Profile code changes will be added to or deleted from the extract.

The following changes in Banner **will NOT appear** in Salary Planner via the Add/Delete process:

- FOAPAL changes.
- Job FTE changes.
- Salary changes.

Detailed instructions can be found at [https://nessie.uihr.uillinois.edu/pdf/Banner/SP\\_budget\\_profile\\_instr.pdf](https://nessie.uihr.uillinois.edu/pdf/Banner/SP_budget_profile_instr.pdf).

As information regarding the University budget becomes available, you will receive additional information and guidance regarding salary planner activities.

Thank you for your assistance.