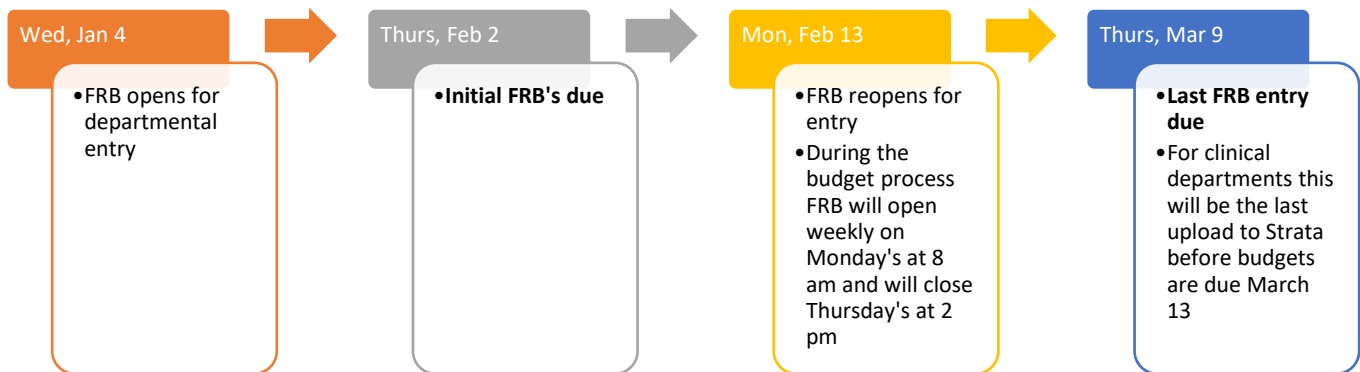


Faculty Roster Budgeting - FY24 Budget Entry

OVERVIEW

Faculty Roster Budgeting (FRB) is the first phase of the FY24 ALL funds budget for SOM departments. FRB is the process to budget our faculty funding (current and/or new faculty).

TIMEFRAME & DUE DATE (SUBJECT TO CHANGE)



NEW THIS YEAR!

"Fund End Date" column has been added to "FRB Current Funding" grid

Budget Amount	Fund	Source	Dept	Account	Pay Type Code	Project ID	Program Code	Job Code	Job Code Desc	Strata Entity	Fund End Date	Add New Funding
29,674.62	24101	16180	412620	511120	Regular	MC243		600011	Clinical Associate Professor	SOM - Residuals		Add
769.30	24101	16180	412620	511120	Regular	MC305		600011	Clinical Associate Professor	SOM - Residuals		Add
428.79	25210	49300	412620	511120	Regular	4101083	MC202	600011	Clinical Associate Professor	SOM - Contracts and Grants	12/31/2024	Add
7,276.78	25210	49300	412620	511120	Regular	4101185	MC202	600011	Clinical Associate Professor	SOM - Contracts and Grants	6/30/2026	Add
428.79	25210	49300	412620	511120	Regular	4101345	MC202	600011	Clinical Associate Professor	SOM - Contracts and Grants	6/30/2026	Add

"Funds Flow Variables" changed to "Other Position Metrics"

Other Position Metrics

cFTE Job FTE Degree Start Date

Comment

For New Employees, MGMA specialty selection has been removed, and AAMC and CPSC specialty selections have been added

Other Position Metrics

cFTE Job FTE Degree Start Date

AAMC Specialty CPSC Specialty

New or Replace

TIPS & REMINDERS

CLINICAL DEPARTMENTS ONLY --- Incentives: Additional Duties / ECC Agreements / Clinical Incentives / Gain Share

- **ECC agreement/Additional duties (511330):** budget these payments in FRB per Provider. Please do not budget for these at the departmental level.
- **Clinical Incentives (511340):** budget these payments per Provider. Please do not budget for these at the departmental level.
- Please do not budget for Gain Share, unless it is communicated to you directly.

CLINICAL DEPARTMENTS ONLY --- Standard Comments

- **Standard comments to use.** Other comments are still allowed, but if you encounter the following scenarios please use the comment provided here.
 1. **Non MD to MD:** "Provider listed as Non MD currently, but will be MD in FY24."
 2. **AAMC/CPSC Specialty:** "MD Provider AAMC specialty needs to be changed to _____. MD Provider CPSC specialty needs to be changed to _____."
 3. **Wrong Home Dept:** "MD Provider is currently in 41xxxx as home dept. In FY24, home dept will be 41xxxx."

CLINICAL DEPARTMENTS ONLY --- New Providers: one "dummy" PID represents one Provider in FRB and Strata, so must use the same "dummy" PID for salary and wRVU budgeting. If the Provider generates wRVUs for multiple bill areas, still one "dummy" PID

If you do not have FRB access/correct access, please contact Jasmine Davis.

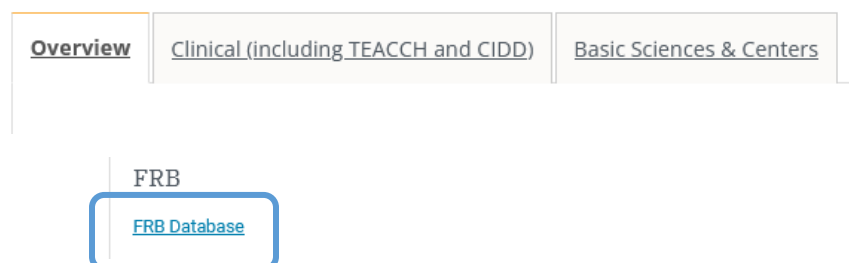
All departments must provide FRB data in the first FRB data upload

If a faculty member's funding will not change or an increase will not be given, you will still need to go into each faculty member's page and input a FY24 budget grid for it to be included in the Roster Budgeting process

STEPS

- Navigate to our website: www.med.unc.edu/fbo. Click on the "FY24 Budget Process" tab, then click on the "FRB Database" link.

FY24 Budget Process



- Once on the FRB site, login with your ONYEN and password.

Faculty Roster Budgeting (FRB) UNC-Chapel Hill

You must log in with your ONYEN to be able to access Finance Business Operations FRB.

ONYEN

PASSWORD

- Select the department/division you would like to begin with and click “Submit”.
 - *Please Note: access is based on the HOME department of the faculty member; not funding department.*

Welcome, Isolana 420102

Based on your user name, your security credentials let you access the following:

Department Selection

Select department

412610 Dermatology - Adult

To report problems please refer to FBO Contacts
[Log out](#)
 (Please log out when you are done.)

CURRENT FACULTY

- This will pull up the list of faculty housed in the given department/division. Select the faculty member you want to adjust.

Employee List

Employee Name	Department	Employee ID
B...	412610	72
C...	412610	72

- This will pull up the data for this specific faculty member. The following header will display and cannot be edited.

Dept	412610	FTE	0.85	cFTE	0.7339136657
PID	70	Base Rate	\$252,228.00	Degree	MD
Faculty Name	C...	Supplement	\$9,999.96		
Primary Job Code	600011	Total Salary	\$262,227.96		
Job Code	Clinical Associate Professor				

Funding

- Below the header is the faculty member’s current funding grid as of December 2022.
- Click the “Add” button to populate any of the funding rows from the “FRB Current Funding” grid to the “2024 Budget Funding” grid. This will populate a FY24 Budget Funding grid.

FRB Current Funding												
Budget Amount	Fund	Source	Dept	Account	Pay Type Code	Project ID	Program Code	Job Code	Job Code Desc	Strata Entity	Fund End Date	Add New Funding
143,278.85	28542	17088	412610	511120	Regular		MC232	600011	Clinical Associate Professor	UNCFP		Add
4,334.29	28542	17719	412608	511120	Regular		MC231	600011	Clinical Associate Professor	UNCFP		Add
143,278.85	28542	17081	412610	511120	Regular		MC232	600011	Clinical Associate Professor	UNCFP		Add
9,999.96	21101	13001	412601	513140	Regular		MC248	400012	Director	SOM - State HA		Add
5,031.65	28542	17088	412610	511340	MD Incentive		MC233	600011	Clinical Associate Professor	UNCFP		Add
4,070.39	28542	17081	412610	511340	MD Incentive		MC233	600011	Clinical Associate Professor	UNCFP		Add
6,973.02	28542	17719	412610	511340	MD Incentive		MC233	600011	Clinical Associate Professor	UNCFP		Add
Base Rate \$300,891.95												
Total Incentive Pay \$16,075.06												
Total Dollars Only Staffing \$0.00												

2024 Budget Funding												
Budget Amount	Fund	Source	Dept	Account	Pay Code Type	Project ID	Program Code	Job Code	Job Code Desc	Strata Entity	Fund End Date	
143,278.85	28542	17088	412610	511120	Regular		MC232	600011	Clinical Associate Professor	UNCFP		
4,334.29	28542	17719	412608	511120	Regular		MC231	600011	Clinical Associate Professor	UNCFP		
143,278.85	28542	17081	412610	511120	Regular		MC232	600011	Clinical Associate Professor	UNCFP		
9,999.96	21101	13001	412601	513140	Regular		MC248	400012	Director	SOM - State HA		
Total New Funding \$300,891.95												

- To add a new funding line, click the **Add New Funding** button at the bottom of the page.
- At a minimum enter the required fields noted by the asterisk. *Note: you can add multiple new funding lines by clicking "Add Another".*

Employee: B PID: 7

New Funding

*Budget Amount	*Fund	Source	*Dept	*Account	Primary Job	Project ID	Program Code	CC1
1000	271	14101	412601	511120	P			

Add Another

*required fields

Submit Add Form

- To make edits to the FY24 grid click the **Edit Funding** button at the bottom of the page.
- The amounts and chartfield string information can be adjusted here.
- This is also where you can delete a funding row that was inadvertently added.

Employee: B PID: 7

Edit Funding List

BudgetAmount*	Fund*	Source*	Dept*	Account*	Primary Job	Project ID	Program Code	CC1	Delete
1000.00	271	14101	412601	511120	P				<input type="checkbox"/>
139756.59	28542	17088	412610	511120	P		MC232	MDEMEDDEF	<input type="checkbox"/>
102978.54	28542	17098	412610	511120	P		MC232	MDEHILLMO	<input type="checkbox"/>
2451.87	28542	17719	412608	511120	P		MC231		<input type="checkbox"/>
5631.59	28542	17088	412610	511340	P		MC233	MDEMEDDEF	<input type="checkbox"/>
5932.49	28542	17098	412610	511340	P		MC233	MDEHILLMO	<input type="checkbox"/>

*required fields

Submit Edits

Other Position Metrics – CLINICAL DEPARTMENTS ONLY

- Make necessary adjustments to cFTE and FTE fields for FY24 budgeting purposes under the "Other Position Metrics" section.
- Changing these variables will not impact the dollar amounts under the funding section. You will still need to do this manually.
- If you are changing the FTE, please leave an explanation in the Comments section (see comments on first page). *Note: you cannot adjust the degree or start date for current employees. This is only to be completed for new employees.*

Other Position Metrics

cFTE 0.7339136657

Job FTE 0.85

Degree MD

Start Date 7/1/2010

Comment

Submit Variables

- Once you are finished with the “Other Position Metrics” section, click the **Submit Variables** button at the bottom of the page. **If you do not click this button the data entered will not save.**
- Click the [Employee List](#) link to return to the list of Faculty members in the department ID you selected.
- A checkmark on the “Employee List” page indicates NEW funding has been entered for that faculty member.
Note: this may not always mean that the faculty member funding is complete, only that new funding has been entered.

Employee List

Employee Name	Department	Employee ID
Bo <input checked="" type="checkbox"/>	412610	
Co	412610	

NEW FACULTY

- Each department/division has been provided with 5 “dummy” PID’s to add new faculty funding. **If additional “dummy” PIDs are needed, please contact your FP Analyst (if in a Clinical Department), or Kristen Beattie (if in a Basic Science Department).**
- To add a new faculty member, click “ZZ New Employee” at the bottom of your employee list.

Employee List

Employee Name	Department	Employee ID
ZZ NewEmployee	412610	99412610A
ZZ NewEmployee	412610	99412610B
ZZ NewEmployee	412610	99412610C

- **Input is required in the following fields:**
 - **New Funding:** input the expected funding grid. Note, you can copy down from “FRB Current Funding” line
 - **cFTE:** input the expected cFTE – **CLINICAL DEPARTMENTS ONLY**
 - **FTE:** input the expected FTE – **CLINICAL DEPARTMENTS ONLY**
 - **Degree:** select “MD”, and if anything else other than “MD”, input “Non-MD” – **CLINICAL DEPARTMENTS ONLY**
 - **Start Date:** input the anticipated start date – **CLINICAL DEPARTMENTS ONLY**

- **AAMC Specialty:** select the AAMC specialty – **CLINICAL DEPARTMENTS ONLY**
- **CPSC Specialty:** select the CPSC specialty – **CLINICAL DEPARTMENTS ONLY**
- **New or Replace:** select “new” for new faculty, or “replace” if this is a vacancy to be filled – **CLINICAL DEPARTMENTS ONLY**

Budget Amount	Fund	Source	Dept	Account	Pay Type Code	Project ID	Program Code	Job Code	Job Code Desc	Strata Entity	Fund End Date	Add New Funding
0.00	28542		412610	511120	Regular			600012	Clinical Assistant Professor	UNCFP		Add
Base Rate												
\$0.00												
Total Incentive Pay												
\$0.00												
Total Dollars Only Staffing												
\$0.00												

Other Position Metrics

cFTE: Job FTE: Degree: Start Date: AAMC Specialty: CPSC Specialty: New or Replace:

Comment:

[Submit Variables](#)

REPORTS

There are several reports in FRB. These are located on the “FRB Options” tab at the top of the page and are explained in greater detail below.

Report Name	Why You Would Use it
1. Funding Dept Report New Funding	Run this report to see where NEW funding lines have been entered for faculty your unit funds. This report is useful for Centers to see the Basic Science and Clinical faculty they fund.
2. Funding Dept Report Old/New Funding	Run this report to see where NEW and OLD funding lines have been entered for faculty your unit funds. This report is useful for Centers to see the Basic Science and Clinical faculty they fund.
3. Home Dept Report Old/New Funding	Run this report to see where NEW and OLD funding lines have been entered for faculty that are housed in your unit.
4. Home Dept Report New Funding	Run this report to see where NEW funding lines have been entered for faculty that are housed in your unit.
5. FRB All Data Dump OLD Funding	Run this report to see where there are OLD funding lines for faculty that are housed in any SOM unit. You will need to filter to your specific unit.
6. FRB Data Dump All	Run this report to see where there are OLD and NEW funding lines for faculty that are housed in any SOM unit. You will need to filter to your specific unit.

FRB options

- 1 Funding Dept Report New Funding
- 2 Funding Dept Report Old/New Funding
- 3 Home Dept Report Old/New Funding
- 4 Home Dept Report New Funding
- 5 FRB All Data Dump OLD Funding
- 6 FRB Data Dump All

FAQ's

Q: What if I do not know the new project ID/source/etc. for FY24 yet?

A: Budget to the best of your ability. For example, if you know the faculty member will be funded from a new project ID but do not have that project ID yet, enter fund 252, the department, and account and leave project field blank.

Q: I will need to create new divisions within my department, and I know there will be faculty in this new division.

How should I enter the data?

A: If a clinical department, please contact your FP Analyst. If a Basic Science department or Center, please contact Jennifer Blair.

Q: Will I have the opportunity to change what I've submitted in FRB?

A: Yes, there will be multiple opportunities throughout the budget process to make changes to FRB.

1. **Initial:** Now thru February 4th
2. **Ongoing:** February 13th – March 9th FRB will be open each week until Thursday at 2 pm. After 2 pm on Thursdays we will take the changes made in FRB and will upload them into Strata. FRB will then reopen on Monday mornings at 8 am for additional changes.
3. **After departmental meetings (CLINICAL DEPARTMENTS ONLY).** Date for this is still to be determined and will be communicated.

Q: There are faculty members I fund but who are not housed in my department? How will I budget for them?

A: Basic Science departments are now involved in the FRB process. If a Clinical department funds a Basic Science faculty member (and vice versa), please coordinate the funding between the two affected units via the Business Manager and ACA.

Q: In my department list, it shows "OS" after the department ID. What does this mean?

A: These are faculty members your department funds but who are housed outside of the School of Medicine (i.e., College of Arts & Sciences, Pharmacy, etc.). This indicates this type of Faculty member. You will only need to update the funding line(s) your department funds if applicable.

Q: I have a faculty member in my list who will be leaving in FY24, how should I handle this?

A: Enter one new funding line in the FY24 Budget Funding grid and enter the amount as zero. Then zero out the cFTE and FTE. Lastly enter an explanation in the comments box (e.g., retiring, leaving, etc.).

Q: If an employee starts in December 2023, do I budget as if they are there for the full year?

A: You will budget for the 6 months that you will be funding them. For example, if the annual salary for the employee is \$120,000, you will budget for \$60,000.

Q: What is the employment status of the SOM Faculty you are pulling?

A: We are pulling all "Active" and "Leave with Pay" Faculty housed in the SOM. This includes temporary and part-time Faculty who have a funding grid.

Q: How would I input NEW funding for Faculty who are not housed in my department and who I have not yet paid this FY (i.e., they are not pulling up in my current list)?

A: For Faculty outside of the SOM click "New Employee" in one of your departments/divisions and add the funding here for the portion your department will be covering. If you're funding multiple Faculty members who are outside of the SOM, and if there are no known associated wRVUs, then lump these amounts together on one "New Employee" FY24 Budget funding grid. That way you will not have to create multiple new employees.

Q: Should incentives be budgeted by Faculty member? Should I budget for the clinical Chair incentive from the Dean's Office?

A: Yes, budget the incentive for each Faculty member individually. Yes, budget for full chair incentive from the Dean's Office. Please consider \$75k as a budgeting guideline to enter for the clinical Chair incentive (generally paid out in November).

Q: What does “New or Replace” mean under the Other Position Metrics section?

A: This will indicate to us if the faculty member is a brand-new faculty member, or if this is a replacement value for a vacant position.

Q: What are the different job codes?

A: The job codes that start with “6” are SOM faculty job codes. The job codes that start with “4” are secondary jobs. See following list.

Job Code	Job Code Description
400009	Associate Dean
400010	Assistant Dean
400012	Director
400013	Associate Director
400014	Assistant Director
400016	Department Chair
400017	Associate Department Chair
400027	Vice Department Chair
400031	Academic Advisor
400035	Administrative Coordinator
400065	Information Tech Professional
400071	Nursing Professional
400078	Research Facility Manager
400079	Research Investigator
400081	Research Program Director
400105	Faculty Coordinator
400107	Program Coordinator
400109	Division Chief

Job Code	Job Code Description
600000	Professor
600001	Associate Professor
600002	Assistant Professor
600004	Distinguished Professor
600005	Scholar
600007	Research Professor
600008	Research Associate Professor
600009	Research Assistant Professor
600010	Clinical Professor
600011	Clinical Associate Professor
600012	Clinical Assistant Professor
600013	Adjunct Professor
600014	Adjunct Associate Professor
600015	Adjunct Assistant Professor
600017	Clinical Instructor
600018	Research Instructor
600025	Distinguished Term Professor
600026	Term Scholar
600027	Adjunct Instructor
600030	Distinguished Trm Rsrch Prof
600035	Distinguished Clinical Prof
600037	Distinguished Clinical Scholar
600049	Teaching Assistant Professor