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).

**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)**

- **Wed, Jan 4**
  - FRB opens for departmental entry

- **Thurs, Feb 2**
  - Initial FRB's due

- **Mon, Feb 13**
  - FRB reopens for entry
  - During the budget process FRB will open weekly on Monday's at 8 am and will close Thursday's at 2 pm

- **Thurs, Mar 9**
  - Last FRB entry due
  - For clinical departments this will be the last upload to Strata before budgets are due March 13

**NEW THIS YEAR!**

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

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

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

Overview | Clinical (including TEACCH and CIDD) | Basic Sciences & Centers

FRB | FRB Database

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

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

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

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.
• 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”.

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.

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.
Once you are finished with the “Other Position Metrics” section, click the button at the bottom of the page. If you do not click this button the data entered will not save.

Click the 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.

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.

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

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.

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

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.

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Job Code Description</th>
<th>Job Code</th>
<th>Job Code Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>400009</td>
<td>Associate Dean</td>
<td>600000</td>
<td>Professor</td>
</tr>
<tr>
<td>400010</td>
<td>Assistant Dean</td>
<td>600001</td>
<td>Associate Professor</td>
</tr>
<tr>
<td>400012</td>
<td>Director</td>
<td>600002</td>
<td>Assistant Professor</td>
</tr>
<tr>
<td>400013</td>
<td>Associate Director</td>
<td>600004</td>
<td>Distinguished Professor</td>
</tr>
<tr>
<td>400014</td>
<td>Assistant Director</td>
<td>600005</td>
<td>Scholar</td>
</tr>
<tr>
<td>400016</td>
<td>Department Chair</td>
<td>600007</td>
<td>Research Professor</td>
</tr>
<tr>
<td>400017</td>
<td>Associate Department Chair</td>
<td>600008</td>
<td>Research Associate Professor</td>
</tr>
<tr>
<td>400027</td>
<td>Vice Department Chair</td>
<td>600009</td>
<td>Research Assistant Professor</td>
</tr>
<tr>
<td>400031</td>
<td>Academic Advisor</td>
<td>600010</td>
<td>Clinical Professor</td>
</tr>
<tr>
<td>400035</td>
<td>Administrative Coordinator</td>
<td>600011</td>
<td>Clinical Associate Professor</td>
</tr>
<tr>
<td>400065</td>
<td>Information Tech Professional</td>
<td>600012</td>
<td>Clinical Assistant Professor</td>
</tr>
<tr>
<td>400071</td>
<td>Nursing Professional</td>
<td>600013</td>
<td>Adjunct Professor</td>
</tr>
<tr>
<td>400078</td>
<td>Research Facility Manager</td>
<td>600014</td>
<td>Adjunct Associate Professor</td>
</tr>
<tr>
<td>400079</td>
<td>Research Investigator</td>
<td>600015</td>
<td>Adjunct Assistant Professor</td>
</tr>
<tr>
<td>400081</td>
<td>Research Program Director</td>
<td>600017</td>
<td>Clinical Instructor</td>
</tr>
<tr>
<td>400105</td>
<td>Faculty Coordinator</td>
<td>600018</td>
<td>Research Instructor</td>
</tr>
<tr>
<td>400107</td>
<td>Program Coordinator</td>
<td>600025</td>
<td>Distinguished Term Professor</td>
</tr>
<tr>
<td>400109</td>
<td>Division Chief</td>
<td>600026</td>
<td>Term Scholar</td>
</tr>
<tr>
<td></td>
<td></td>
<td>600027</td>
<td>Adjunct Instructor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>600030</td>
<td>Distinguished Trm Rsch Prof</td>
</tr>
<tr>
<td></td>
<td></td>
<td>600035</td>
<td>Distinguished Clinical Prof</td>
</tr>
<tr>
<td></td>
<td></td>
<td>600037</td>
<td>Distinguished Clinical Scholar</td>
</tr>
<tr>
<td></td>
<td></td>
<td>600049</td>
<td>Teaching Assistant Professor</td>
</tr>
</tbody>
</table>