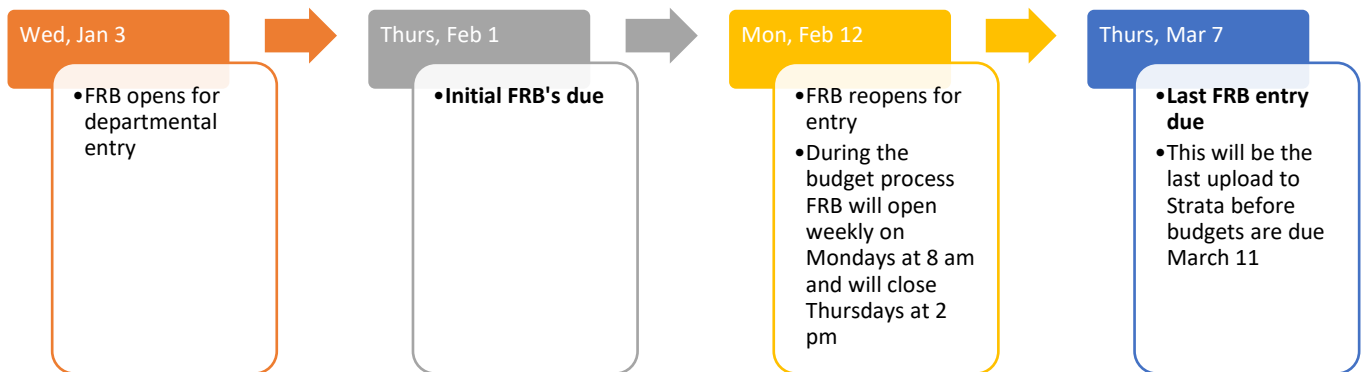


# Faculty Roster Budgeting - FY25 Budget Entry

## OVERVIEW

Faculty Roster Budgeting (FRB) is the first phase of the FY25 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!

- Detailed Clinical Fund Budget Only**
  - Only clinical funds will need to be budgeted in detail.
  - Academic wages can be lumped onto one line (whichever academic fund you'd prefer).
- Academic Incentives (if applicable)**
  - Academic incentives (if applicable) will need to be budgeted using the academic incentive source.
  - Academic incentive source: 29110-15305-511340
- There will NOT be 5 automatic dummy PIDS.**
  - There will not be 5 automatic dummy PIDs loaded in FRB for every division. Instead, the approved pro forma request ID will be loaded in FRB for the new providers.
  - New dummy PID requests can be made via your FP Analyst if replacing a provider.

## TIPS & REMINDERS

### 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.
- **Academic Incentive Source:** 29110-15305-511340
- Please do not budget for Gain Share unless it is communicated to you directly.

### 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."

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

- **There will not be 5 automatic dummy PIDs loaded in FRB for every division.** Instead, the approved pro formas will be loaded in FRB for new Providers. New dummy PID requests can be made (via your FP Analyst) if replacing a Provider.
- **Dummy PID Naming Convention:** The number 25 and the 6-digit proforma request ID; zeros will proceed 4-digit proforma request IDs
- **Examples:** Six-digit proforma ID-25365225 Four-digit proforma ID 25002507

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

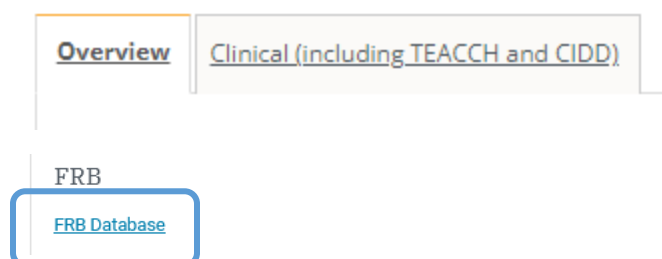
All departments **must** provide FRB data in the first FRB data upload.

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 FY25 budget grid for it to be included in the Roster Budgeting process

## STEPS

- **Navigate to our website:** [www.med.unc.edu/fbo](http://www.med.unc.edu/fbo). Click on the "FY25 Budget Process" tab, then click on the "FRB Database" link.

### FY25 Budget Process



- 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.*

---

### 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	Ci	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 2023.
- Click the “Add” button to populate any of the funding rows from the “FRB Current Funding” grid to the “2025 Budget Funding” grid. This will populate the FY25 Budget Funding grid.
  - REMINDER: a detailed clinical budget is required, but you can lump all academic wage lines into one line. A total salary amount is needed.**

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
<b>Base Rate</b> \$300,891.95												
<b>Total Incentive Pay</b> \$16,075.06												
<b>Total Dollars Only Staffing</b> \$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		
<b>Total New Funding</b> \$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 1000	*Fund 271	Source 14101	*Dept 412601	*Account 511120	Primary Job P	Project ID	Program Code	CC1
------------------------	--------------	-----------------	-----------------	--------------------	------------------	------------	--------------	-----

Add Another

\*required fields

Submit Add Form

- To make edits to the FY25 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

- Make necessary adjustments to cFTE and FTE fields for FY25 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
<a href="#">Bo</a> <input checked="" type="checkbox"/>	412610	
<a href="#">Co</a>	412610	

NEW FACULTY

- There will not be 5 automatic dummy PIDs loaded in FRB for every division. Instead, the approved pro formas will be loaded in FRB for new Providers.
- If a “dummy” PID is needed for replacement Provider, please contact your FP Analyst.
- To add funding to an approved pro forma for a new faculty member, click the New Provider position in your FRB list (see example below). The first part of the name will include the position.

Employee Name	Department	Employee ID
<a href="#">Nyrop Kirsten Alida</a>	411491	703782713
<a href="#">Oncology MD 66 Breast New Provider</a>	411491	25002523
<a href="#">Patel Shetal A</a>	411491	704867013

- **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
  - **FTE:** input the expected FTE

## 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.

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

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.
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.
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. <b>You will need to filter to your specific unit.</b>
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. <b>You will need to filter to your specific unit.</b>

## FAQ's

**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: Please contact your FP Analyst.

**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 4<sup>th</sup>
2. **Ongoing:** February 12<sup>th</sup> – March 7<sup>th</sup> 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.** 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: If a Clinical department funds a faculty member in another Clinical department, please coordinate the funding between the two affected units via the ACAs.

**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 FY25, how should I handle this?**

A: Enter one new funding line in the FY25 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 2024, 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: 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 and separate the academic from clinical incentive where necessary. 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 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
40009	Associate Dean
40010	Assistant Dean
40012	Director
40013	Associate Director
40014	Assistant Director
40016	Department Chair
40017	Associate Department Chair
40027	Vice Department Chair
40031	Academic Advisor
40035	Administrative Coordinator
40065	Information Tech Professional
40071	Nursing Professional
40078	Research Facility Manager
40079	Research Investigator
40081	Research Program Director
400105	Faculty Coordinator
400107	Program Coordinator
400109	Division Chief

Job Code	Job Code Description
60000	Professor
60001	Associate Professor
60002	Assistant Professor
60004	Distinguished Professor
60005	Scholar
60007	Research Professor
60008	Research Associate Professor
60009	Research Assistant Professor
60010	Clinical Professor
60011	Clinical Associate Professor
60012	Clinical Assistant Professor
60013	Adjunct Professor
60014	Adjunct Associate Professor
60015	Adjunct Assistant Professor
60017	Clinical Instructor
60018	Research Instructor
60025	Distinguished Term Professor
60026	Term Scholar
60027	Adjunct Instructor
60030	Distinguished Trm Rsrch Prof
60035	Distinguished Clinical Prof
60037	Distinguished Clinical Scholar
60049	Teaching Assistant Professor