

End User Training

Strata® Operating Budgeting

January 2024

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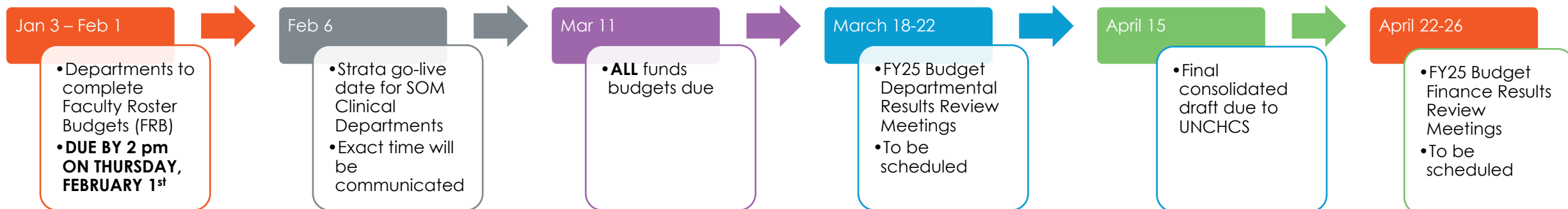
FY25 Budget Website

- Access this site for budget documentation and additional information

A solid orange vertical bar is positioned to the left of the word 'Overview'.

Overview

SOM Clinical Department Timeline



FRB Open/Close Dates

Mon, 2/12, 8 am •FRB Reopens	Thurs, 2/15, 2 pm •FRB Closes •Data available to review in Strata on Friday
Mon, 2/19, 8 am •FRB Reopens	Thurs, 2/22, 2 pm •FRB Closes •Data available to review in Strata on Friday
Mon, 2/26, 8 am •FRB Reopens	Thurs, 2/29, 2 pm •FRB Closes •Data available to review in Strata on Friday
Mon, 3/4, 8 am •FRB Reopens	Thurs, 3/7, 2 pm •FRB Closes •Data available to review in Strata on Friday

Your Contact

Contact your analyst for:

- Additional access if necessary
- Department specific questions
- New approved positions in FRB

Weekly Meetings

- An opportunity for departments to ask questions/get clarification

Department	Contact
Anesthesiology	Kristen Tignor
CIDD	Suzanne Scott
Dermatology	Kristin LeGrow
Emergency Medicine	Shawn White
ENT	Marisa Anthony
Family Medicine	Marisa Anthony
Health Sciences	Shawn White
Medicine	Suzanne Scott
Neurology	Shawn White
Neurosurgery	Marisa Anthony
OBGYN	Marisa Anthony
Ophthalmology	Marisa Anthony
Orthopaedics	Shawn White
Pathology	Sarah Frankey
Pediatrics	Suzanne Scott
PM&R	Marisa Anthony
Psychiatry	Alfred Kang
Radiation Oncology	Marisa Anthony
Radiology	Marisa Anthony
Surgery	Brittney Kass
TEACCH	Suzanne Scott
Urology	Shawn White

The Funds in Strata and Where the Historic Data Comes From

REMINDER: Only clinical funds are being budgeted for FY25, therefore only the 285 fund type is being fed from the GL and FRB

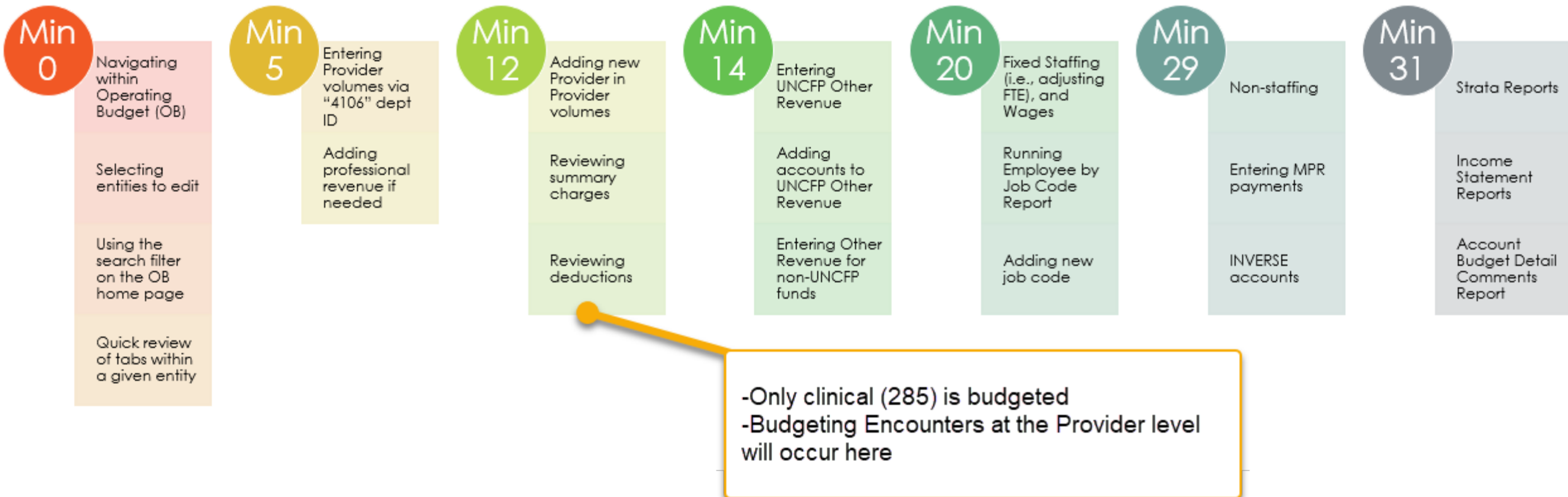
PS Fund	Strata "Entity"	Revenue	Expense	SOM Dashboard Data Fund Description
285	UNCFP	GL	GL	FP
201	SOM - State AA	GL + Expense Budget	GL	State
211	SOM - State HA	GL + Expense Budget	GL	State
221	SOM - State AHEC	GL + Expense Budget	GL	State
241	SOM - Residuals	GL	GL	Gifts, Endowment Inc and Other
252	SOM - Contracts and Grants	GL	GL	Contracts and Grants
271	SOM - Overhead	GL + Expense Budget	GL	Overhead
281	SOM - Endowment Inc Unrestr	GL	GL	Gifts, Endowment Inc and Other
282	SOM - Endowment Inc Restr	GL	GL	Gifts, Endowment Inc and Other
291	SOM - Gifts-Endowment Inc and Other Unrestr	GL	GL	Gifts, Endowment Inc and Other
292	SOM - Gifts-Endowment Inc and Other Restr	GL	GL	Contract Trust or Gifts, Endow Inc and Other
295	SOM - Auxiliary-Recharge-Core Facilities	GL	GL	Auxiliary/Recharge-Core Facilities

Strata Training Video Table of Contents

Strata Training Video Table of Contents

This slide provides a table of contents for the Strata training video, so that if you're looking for a specific section, you can easily navigate to it within the video.

Please note: this is the recording from the FY22 budget process, and some things may no longer apply (e.g., 4106 dept IDs for Provider Volumes), but the processes mentioned are still conceptually the same.



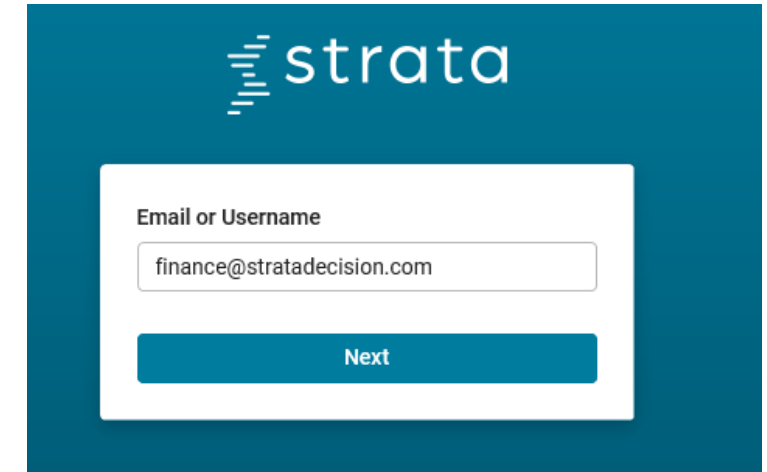
Logging In, Reviewing the Home Page, and Accessing Your Department Budgets

Logging In

1. Open **Internet Explorer, Edge, or Chrome**.
2. Type secure.stratanetwork.com into the address bar.
3. Log in with your company email address.
 1. Enter your email, click Next
 2. Click Log In

If when you access Strata you encounter the following screen, click the small link that says “click here”. You will be redirected to a login screen that requires only your email address.

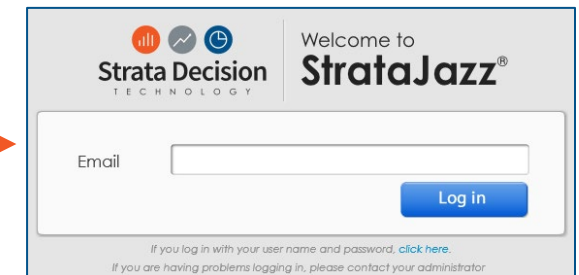
Bookmark this page to your browser.



The screenshot shows a login form on a blue background with the Strata logo at the top. The form has a white background and contains a text input field labeled 'Email or Username' with the value 'finance@stratadecision.com'. Below the input field is a blue button labeled 'Next'.



The screenshot shows the StrataJazz login page. It features the Strata Decision Technology logo and the text 'Welcome to StrataJazz®'. There are four input fields: 'Username', 'Password', 'Org PIN', and 'Database'. Below the 'Database' field is a 'Log In' button. A small link labeled 'click here' is highlighted with a red box. At the bottom, there is a note: 'If you log in with your email address, click here.' and another note: 'If you are having problems logging in, please contact your administrator.'



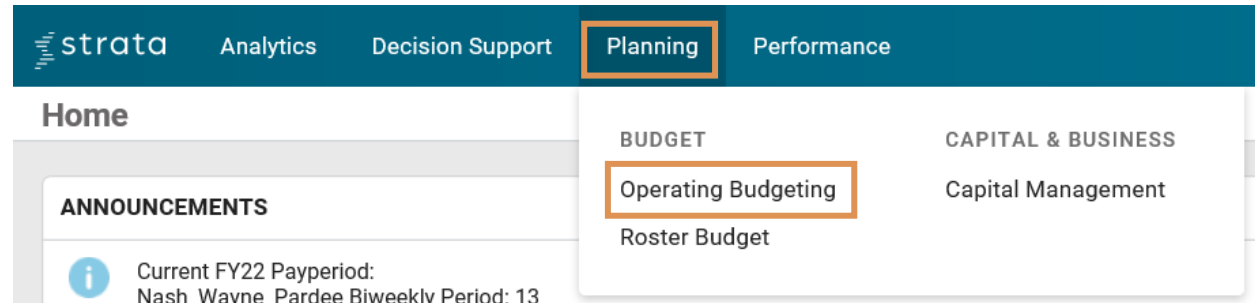
The screenshot shows the StrataJazz login page after redirection. It features the Strata Decision Technology logo and the text 'Welcome to StrataJazz®'. There is a single input field labeled 'Email' and a blue button labeled 'Log in'. At the bottom, there is a note: 'If you log in with your user name and password, click here.' and another note: 'If you are having problems logging in, please contact your administrator.'

Accessing & Navigating on the OB Home Page

Once logged into Strata, navigate to **Planning > Operating Budgeting**

Begin to enter the department ID you want to review. Click the magnifying glass to search on what you've entered or hit enter on your keyboard.

Click on the entity you want to edit so that it is highlighted blue. Then click the "Edit Budget" tab. Alternatively, double click the entity you want to edit, and from the new window that appears, click "Edit Budget".



Operating Budgeting

Departmental Budget (15)

4142

	Name ^	Step	Budget Status	OB - Finance	FTEs - Budget Yr	Fixed FTEs - Budget Yr
1	SOM - Auxiliary-Recharge-Core Facilities-414201 - Neurosurgery - Admin	Initialize	Draft		0.00	0.00
2	SOM - Auxiliary-Recharge-Core Facilities-414202 - Neurosurgery	Initialize	Draft		0.00	0.00
3	SOM - Contracts and Grants-414201 - Neurosurgery - Admin	Initialize	Draft		0.00	0.00

Operating Budgeting

Departmental Budget (15)

4142

	Name ^	Step	Budget Status	OB - Finance	FTEs - Budget Yr	Fixed FTEs - Budget Yr
1	SOM - Auxiliary-Recharge-Core Facilities-414201 - Neurosurgery - Admin	Initialize	Draft		0.00	0.00
7	SOM - Gifts-Endowment Inc and Other Restr-414202 - Neurosurgery	Initialize	Draft		0.00	0.00
8	SOM - Overhead-414201 - Neurosurgery - Admin	Initialize	Draft		0.00	0.00

Additional Resources

strata

[Analytics](#)
[Decision Support](#)
[Planning](#)
[Performance](#)

Home

ANNOUNCEMENTS + Add

UNC IMPL (Production) Support, StrataJazz - 01/03/2024

FY23 and FY24 through September net revenue, settlements and costs have been updated. FY23 and FY24 Sept settlements now include the HASP allocation. Brant, Michele - 01/02/2024

FY24 net revenue and cost have been updated through September. DSS Profitability reporting is available. Huneycutt, Sarah - 12/04/2023


REMINDER: MR reports should not be run before 8am ET. System calculations may be running prior to 8am. Running reports prior to 8am may yield incorrect numbers in the MR reports.
The exception to the schedule above is Tuesday nights when Strata performs weekly maintenance. Wednesday morning expect the finish time by 9am. LeGay, Jeff - 11/01/2023

CAPITAL PROJECTS + New Capital Project [View All Capital Projects](#)

You have not created any Capital Projects.

DEPARTMENTAL BUDGETS [View All Departmental Budgets](#)

WELCOME BACK, LAUREN



NOTIFICATIONS (3)

- ! You have **8,900 Critical** exceptions.
- ! You have **208,108 Important** exceptions.
- i You have **80,924 Informational** exceptions.

ON THIS PAGE

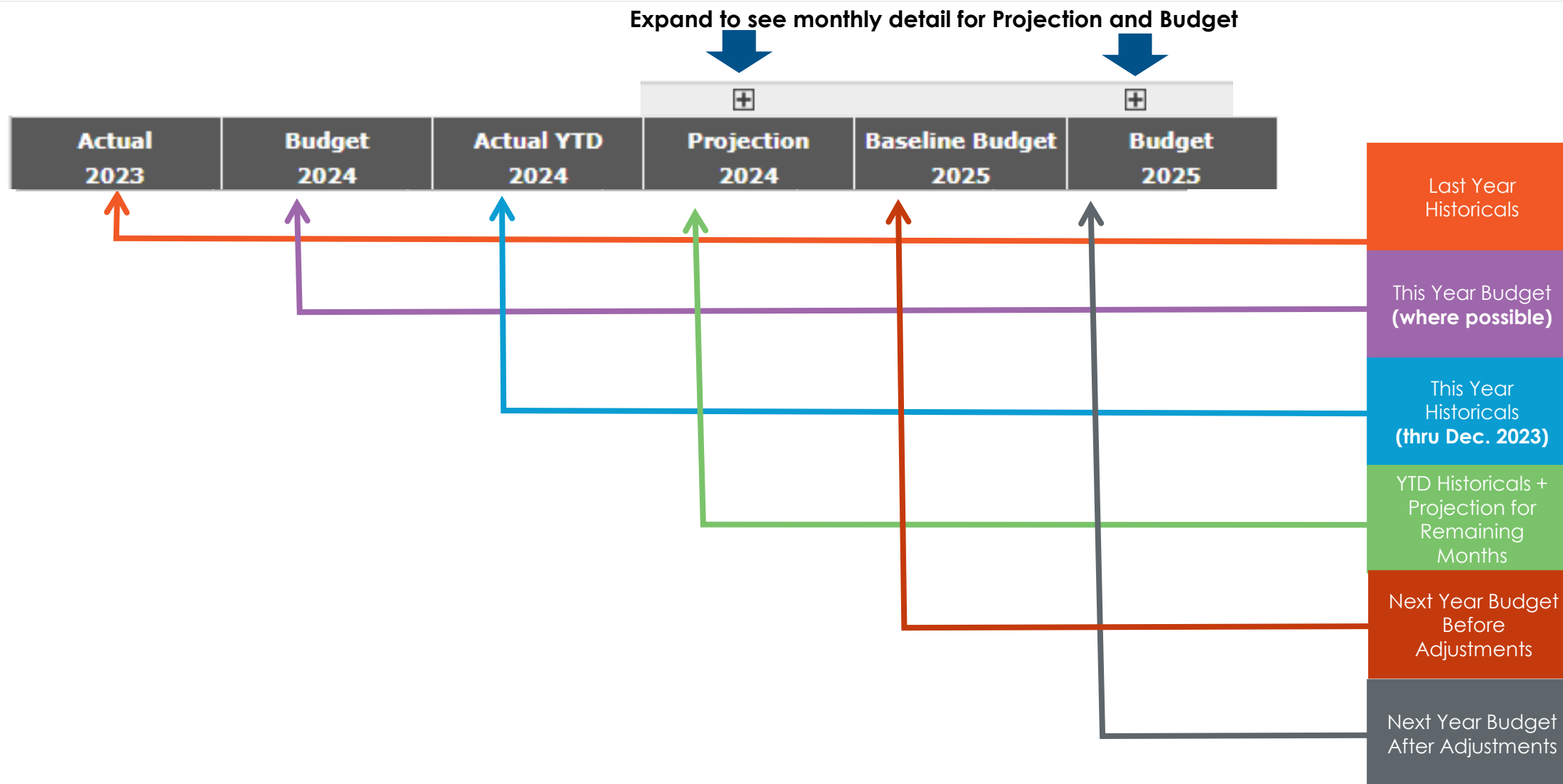
- Tutorials
- Help Center
- Training Center
- Idea Center

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Navigating within Operating Budgeting for a Given Entity

Budget Year Structure



Tab Overview – UNCFP & SOM entities (your department ID)

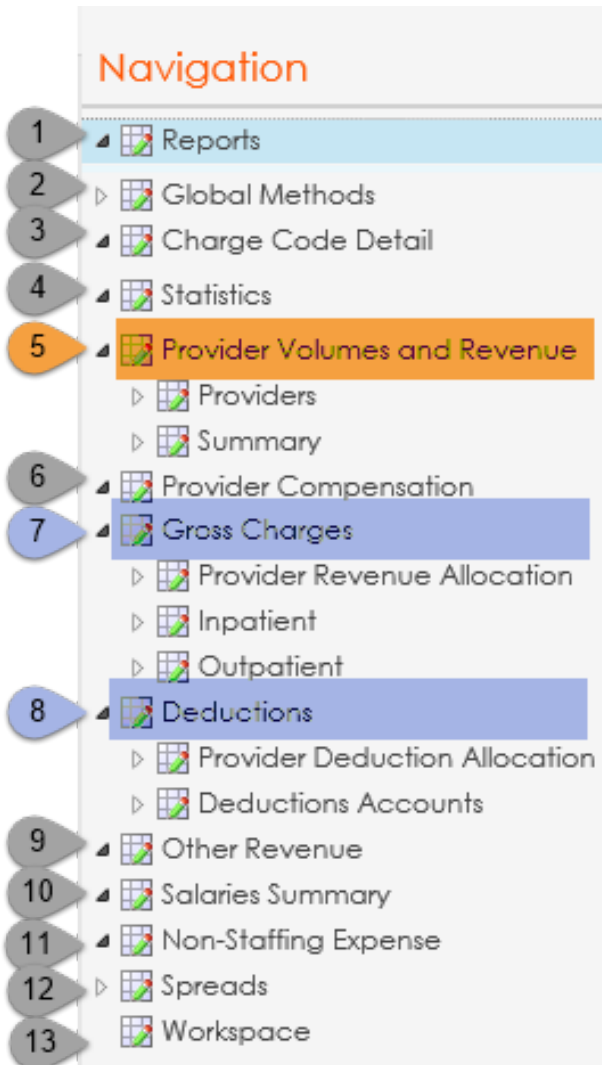


1. Shows the Income Statement and other reports used by the HCS
2. Shows the projection methods applied to the different sections within the workbooks
3. Forecast volumes which drives revenue and expense
4. Where you will enter your revenue/budget for a given entity
5. Where adjustments can be made to FTE for employees you fund from a given entity
 - I.E. if Research Assistant Randy is moving from .5 to .75 FTE, input this adjustment here
6. Where adjustments can be made to the overall wage for a given employee group. We are using the "Salaries by Pay Type" sub-tab
 - I.E. if Admin Ann is getting a \$5,000 increase on a given entity, input the amount here
7. Shows a consolidated total salary expense in multiple ways
8. Where adjustments to benefits can be made
9. Where adjustments can be made to non-personnel line items
10. Lays out the different spread options used in the budget
11. To be used as a "scratch pad" if needed or wanted

ADMIN/REVIEW ONLY

INPUT IS REQUIRED BY DEPARTMENT

Tab Overview – UNCFP Revenue (EPIC clinical revenue)



Navigation

- 1 Reports
- 2 Global Methods
- 3 Charge Code Detail
- 4 Statistics
- 5 **Provider Volumes and Revenue**
 - Providers
 - Summary
- 6 Provider Compensation
- 7 **Gross Charges**
 - Provider Revenue Allocation
 - Inpatient
 - Outpatient
- 8 **Deductions**
 - Provider Deduction Allocation
 - Deductions Accounts
- 9 Other Revenue
- 10 Salaries Summary
- 11 Non-Staffing Expense
- 12 Spreads
- 13 Workspace

1. Shows the Income Statement and other reports used by the HCS
2. Shows the projection methods applied to the different sections within the workbooks
3. Shows the historical, projected, and budgeted charge units, rate, and dollars
4. Forecast volumes which drives revenue and expense
5. Where revenue by bill area by Provider will be entered (wRVUs/ASA/Encounters)
6. Not applicable
7. Calculates revenue by patient class, separated into GL accounts, based on the patient class statistic volumes and the dollars per unit
8. Forecasts the total deductions that the model applies to the gross charges total
9. Not applicable
10. Not applicable
11. Not applicable
12. Lays out the different spread options used in the budget
13. To be used as a “scratch pad” if needed or wanted

REVIEWED BUT NO INPUT REQUIRED

INPUT IS REQUIRED BY DEPARTMENT

UNCFP Revenue Department ID Logic

Each workbook will be limited to 50 Providers and listed alphabetically

No “Dummy PIDs”; instead there will be approved pro-forma numbers and positions loaded.

- FY25 New Provider ID's will start with “25”
- FY24 New Provider ID's begin with “24” and **SHOULD NOT BE USED**
- **If there is a New Provider that begins with “99” – DO NOT USE.**

Global Methods / Spread Methodologies

Universal

- **Staffing:** Annualized
 - Increase Assumptions:
 - 2.5% for HCS employees (beginning February 2024)
 - 2.5% for University employees (beginning July 2024)
- **Benefits:** Practice Plan benefit spread (based on historicals)
- **Non-Staffing:** Even

UNCFP Entities

- **Provider Volume**
 - FY23 Projection: Rolling 12
 - FY24 Budget: Practice Plan charge spread (based on historicals)
- **Other Revenue:** Even

SOM Entities

- **Other Revenue:** Rolling 12

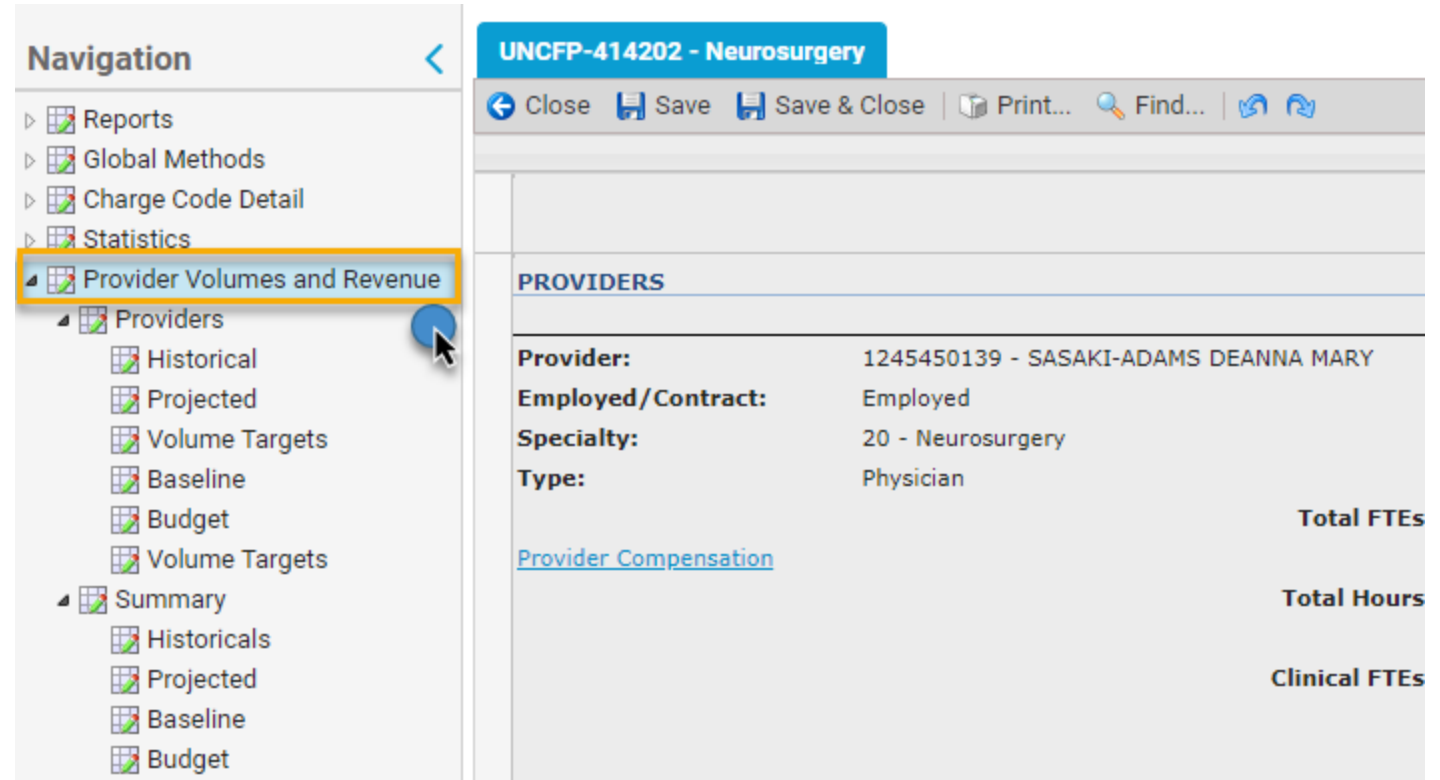
Revenue Provider Volumes & Revenue

NOTE: In the event an Excel file load is attempted and is successful for FY25 volumes, slides 20-22 are not applicable.

Provider Volumes & Revenue

When entering Provider Volumes, select the appropriate department and navigate to the “Provider Volumes and Revenue” section.

- **If there is an “A”, “B”, “C”, etc. following the department name, enter the revenue in this department.**



The screenshot displays the software interface for entering provider volumes and revenue. On the left, a navigation menu is visible with the following items:

- Reports
- Global Methods
- Charge Code Detail
- Statistics
- Provider Volumes and Revenue** (highlighted with a yellow box and a mouse cursor)
- Providers
 - Historical
 - Projected
 - Volume Targets
 - Baseline
 - Budget
 - Volume Targets
- Summary
 - Historicals
 - Projected
 - Baseline
 - Budget

The main content area shows the details for the department **UNCFP-414202 - Neurosurgery**. The interface includes a toolbar with options: Close, Save, Save & Close, Print..., Find..., and Refresh. Below the toolbar, the **PROVIDERS** section is displayed with the following information:

Provider:	1245450139 - SASAKI-ADAMS DEANNA MARY
Employed/Contract:	Employed
Specialty:	20 - Neurosurgery
Type:	Physician

Below the provider details, there are three summary rows:

Provider Compensation	Total FTEs
	Total Hours
	Clinical FTEs

NOTE: In the event an Excel file load is attempted and is successful for FY25 volumes, slides 20-22 are not applicable.



Provider Volumes & Revenue, cont.

- Input the anticipated wRVUs in the “Budget 2025 Adj.” column. **Total Units will not automatically populate when OP/IP wRVUs are input, so you must manually input this.**

UNCFP-412603 - Dermatology-MOHS		AM	AN	AO	CC	CD	CE	CF	CG	CT	CU	CY	CZ	
					Baseline Budget 2025	Baseline Budget 2025		Spread Method	Budget 2025 Adj.	Budget 2025		Target Variance	Specialty Target - Label	
231														
241														
242	Provider:	1578785002 - MERRITT BRADLEY GENE												
243	Employed/Contract:	Employed												
244	Specialty:	6 - Dermatology												
245	Type:	Physician												
246		Total FTEs												
247	Provider Compensation	Total Hours												
248														
249		Clinical FTEs												
250														
251														
252														
253														
254	IP wRVUs													
264	OP wRVUs													
274	ASA Units													
284	Total Units													
294	Encounters													
337	Production Earnings Volume													
338														
339														
340	Professional Revenue			\$	5,641,560		UNCFP	\$	-	\$	5,641,560			
391														
392	Total Revenue			\$	5,641,560					\$	5,641,560			

1

Adjustment

NOTE: In the event an Excel file load is attempted and is successful for FY25 volumes, slides 20-22 are not applicable.



Gross Charges & Deductions

- Gross Charges
 - Based on department historical account posting
- Deductions
 - Based on department historical account posting
 - Using rolling 12-month closed collection rate

**Other Revenue
UNCFP Entities**

Other Revenue: UNCFP

Examples of “Other Revenue” in UNCFP entities

- Contracts
- Expert Witness
- CIC Funding
- Transfers (482xxx)*

*Expense Transfer

- Transfers (582xxx)
- Will be used to transfer accounts to make the Academic Fund (29110-15305) whole from cost share and academic incentives
- This is for informational purposes only. FP Finance will manage this on the back end.

Other Revenue: UNCFP, cont.

UNCFP Other Revenue is housed in your department IDs (e.g., 4126XX for Dermatology).

Operating Budgeting

Departmental Budget (9) 412601

Select Refresh Edit Budget Edit Budget in Excel Routing Slip Report Export Tools Refresh Mode

Name	Step	Budget Status	OB - Finance	Es Yr	Fixed FTEs - Budget Yr
1 UNCFP-412601 - Dermatology	Initialize	Draft		0.00	0.00
2 SOM - State HA-412601 - Dermatology	Initialize	Draft		0.00	0.00
3 SOM - State AHEC-412601 - Dermatology	Initialize	Draft		0.00	0.00

If budgeting Other Revenue, select the appropriate entity, and navigate to the “Other Revenue” section within this entity.

Navigation

- Reports
- Global Methods
- Statistics
- Other Revenue
 - History Based
 - Zero Based
 - Fixed Staffing
 - Wages
 - Salaries Summary
 - Benefits
 - Non-Staffing Expense
 - Spreads
 - Workspace

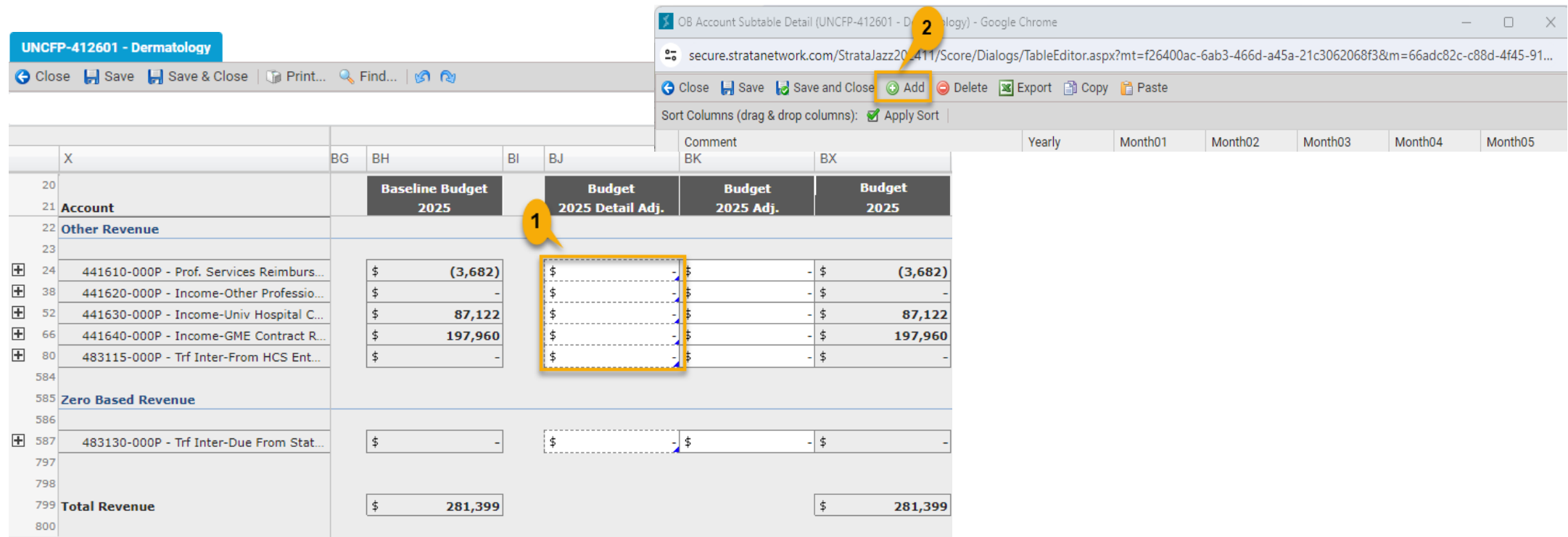
UNCFP-412601 - Dermatology

Close Save Save & Close Print... Find...

Account	Rollup
Other Revenue	
+ 433110-000P - Endowment Income	Investment Income (Loss)
+ 441610-000P - Reimbursements	Other Operating Revenue
+ 441630-000P - Income-Univ Hospital C...	Other Operating Revenue
+ 441640-000P - Income-GME Contract R...	Other Operating Revenue
+ 441670-000P - Medicaid Upper Paymen...	UPL
+ 441690-000P - Meaningful Use Payment	Other Operating Revenue
+ 442710-000P - MD Allocation wRVU_ASA	Outpatient
+ 442720-000P - Non MD Allocation wRVU	Outpatient

Other Revenue: UNCFP, cont.

1. To enter an amount, double click within the appropriate "Budget 2025 Detail Adj" cell. This will open another window where you will enter the revenue amount. **Comments are required for this.**
2. Click the "Add" button. This will populate a line where you can enter amounts and comments. Click "Save and Close".



The screenshot shows a web browser window displaying a budgeting application. The browser title is "OB Account Subtable Detail (UNCFP-412601 - Dermatology)". The address bar shows the URL: "secure.stratanetwork.com/StrataJazz202411/Score/Dialogs/TableEditor.aspx?mt=f26400ac-6ab3-466d-a45a-21c3062068f3&m=66adc82c-c88d-4f45-91...". The application toolbar includes buttons for "Close", "Save", "Save and Close", "Add", "Delete", "Export", "Copy", and "Paste". The "Add" button is highlighted with a yellow callout labeled "2".

The main data table has the following structure:

X	BG	BH	BI	BJ	BK	BX	Yearly	Month01	Month02	Month03	Month04	Month05
20												
21		Baseline Budget										
21	Account	2025			Budget	Budget						
22					2025 Detail Adj.	2025 Adj.						
22												
22	Other Revenue											
23												
24	+	441610-000P - Prof. Services Reimburs...	\$	(3,682)	\$	-	\$	-	\$	(3,682)		
38	+	441620-000P - Income-Other Professio...	\$	-	\$	-	\$	-	\$	-		
52	+	441630-000P - Income-Univ Hospital C...	\$	87,122	\$	-	\$	-	\$	87,122		
66	+	441640-000P - Income-GME Contract R...	\$	197,960	\$	-	\$	-	\$	197,960		
80	+	483115-000P - Trf Inter-From HCS Ent...	\$	-	\$	-	\$	-	\$	-		
584												
585		Zero Based Revenue										
586												
587	+	483130-000P - Trf Inter-Due From Stat...	\$	-	\$	-	\$	-	\$	-		
797												
798												
799		Total Revenue	\$	281,399	\$		\$		\$	281,399		
800												

Expense Fixed Staffing, Wages, Benefits, and Non-Staffing

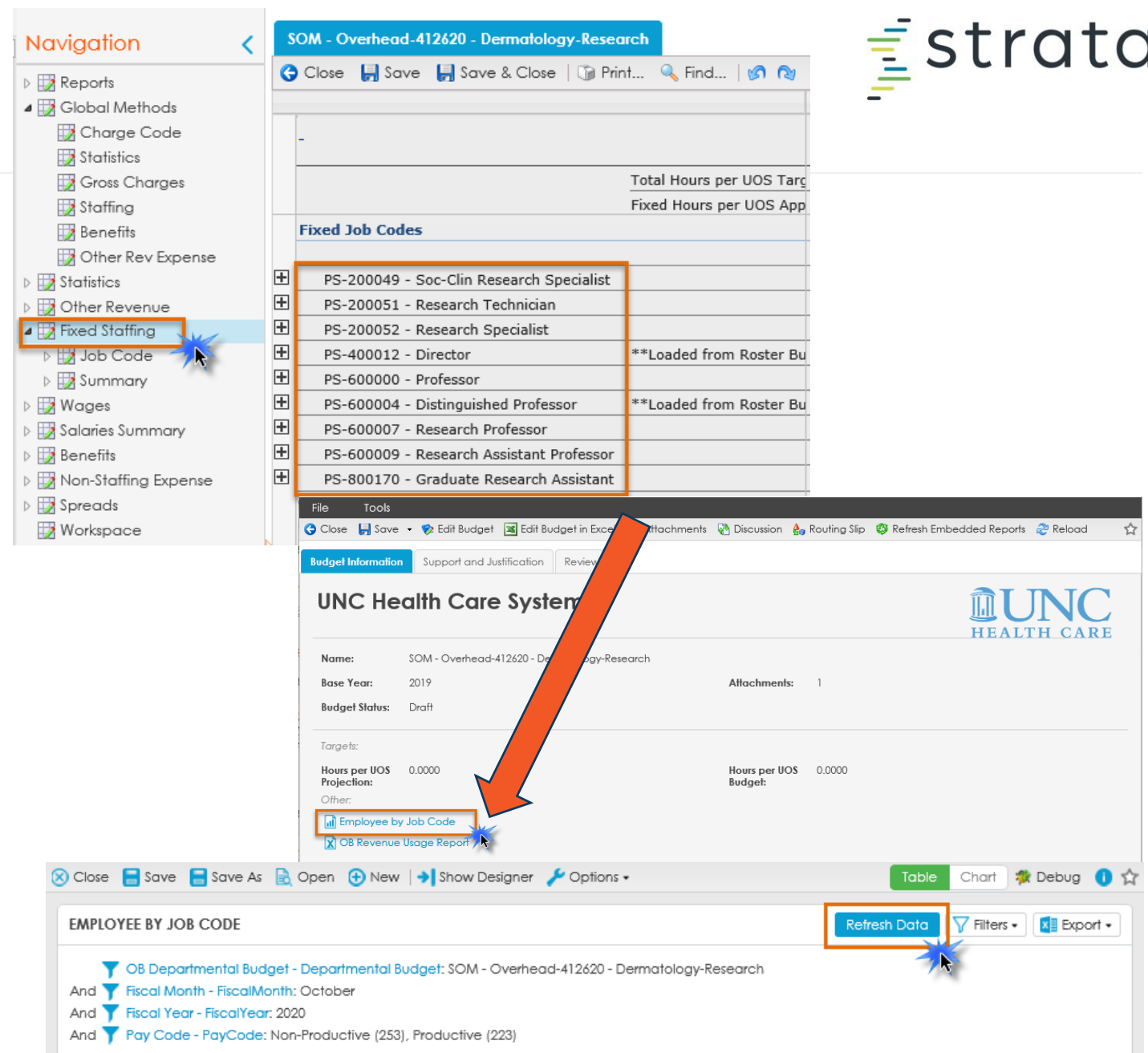
Fixed Staffing

Navigate to “Fixed Staffing” within your Strata workbook. This will display a list of job codes and their corresponding FTEs associated with this entity.

Note: those with a ** are loaded from Faculty Roster Budgeting (FRB). You will **NOT** be able to edit the Regular, MD Incentive, ECC agreement/additional duties amounts for these employees in Strata.

If you’d like to see who is within a given job code, you can run the “Employee by Job Code Report” from the *Edit Budget* window popup.

Be sure to click “Refresh Data” when the report window opens.



The screenshot shows the Strata software interface. On the left, a navigation pane lists various categories, with "Fixed Staffing" selected. The main window displays a list of "Fixed Job Codes" for "SOM - Overhead-412620 - Dermatology-Research". The list includes job codes such as PS-200049, PS-200051, PS-200052, PS-400012, PS-600000, PS-600004, PS-600007, PS-600009, and PS-800170. Some entries are marked with "**Loaded from Roster Budgeting".

Below the job codes, the "Employee by Job Code" report is visible. The report title is "EMPLOYEE BY JOB CODE" and it shows filters for "OB Departmental Budget - Departmental Budget: SOM - Overhead-412620 - Dermatology-Research", "Fiscal Month - FiscalMonth: October", "Fiscal Year - FiscalYear: 2020", and "Pay Code - PayCode: Non-Productive (253), Productive (223)". A "Refresh Data" button is highlighted with a red box and a blue starburst.

Fixed Staffing, cont.

1. Navigate to the job code where you want to increase or decrease the FTE
2. Enter the FTE change in the "Budget Total Adj". column. Once the FTE has been updated this will update the amount associated with the job code on the Wages tab
 - a) If you want to input the FTE change in a specific month, click the "Budget Total Adj.+" to expand the months.
 - b) Input the FTE change in the month the change will take effect and it will project to the end of the FY

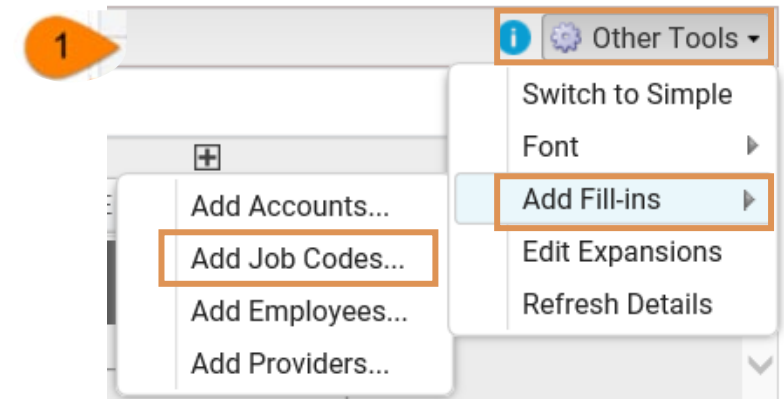
UNCFP-412620 - Dermatology-Research

Close Save Save & Close Print... Find... Other Tools

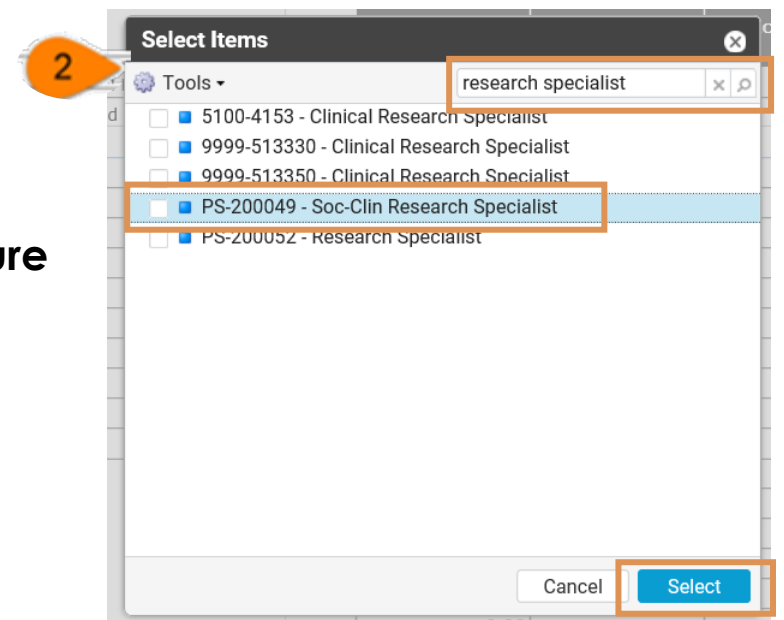
X	Y	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS
		Baseline Budget 2025	Budget Total Adj.		Budget 2025								
			Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar		
20													
21													
22		Total Hours per UOS Targ											
23		Fixed Hours per UOS App											
48		Fixed Job Codes											
49													
50		PS-600004 - Distinguished Professor											
51													
52													
53													
54		Projection Method:	Total FTE Adjustment:		Hr - FTE Conversion:								
55		Default											
56		Default Projection Method											
57		Annualized											
58													
59													
60													
61													
62		Non-Productive:	Baseline Adj. Type		Emp. Adj (FTEs)								
63		% of Total											
64													
65													
66													

Fixed Staffing – Adding Job Code

1. If you find you need to add an additional job code, navigate to “Other Tools” on the top right side of the screen within the Fixed Staffing tab. Select “Add Fill-ins” > “Add Job Codes”



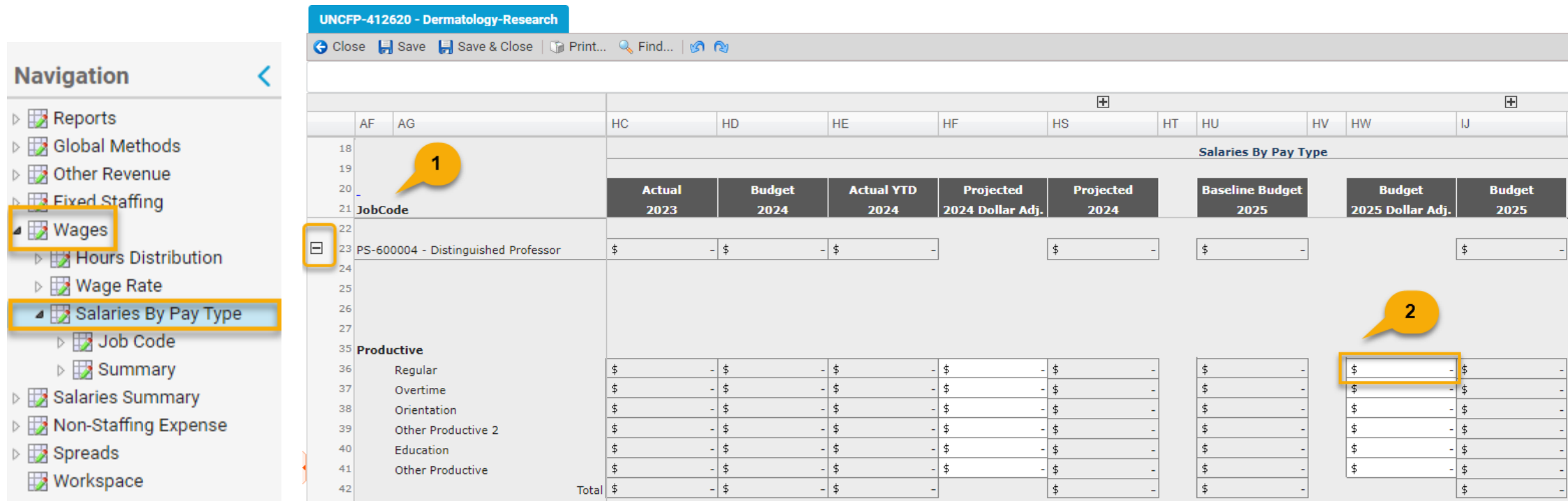
2. Search for the job code you want to add. Click on the desired job code and click “Select”. This will input the job code within the workbook. **Be sure to save your workbook after adding this job code to ensure it remains.**



Please note: only add job codes that begin with “PS” (University) or “PSH-999XXX” (Health Care System).

Wages > Salaries By Pay Type

1. Navigate to the job code where you want to apply an overall increase/decrease in salary. Expand the job code.
2. Enter the overall increase/decrease amount for this job code in the "Budget 2025 Dollar Adj." column.



UNCFP-412620 - Dermatology-Research

Close Save Save & Close Print... Find...

Navigation

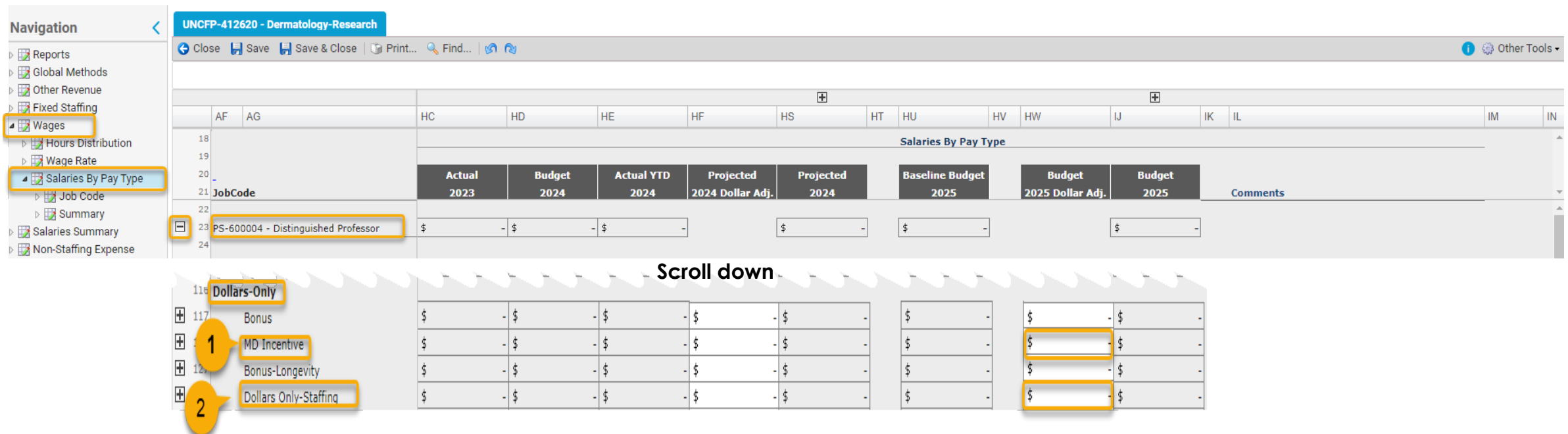
- Reports
- Global Methods
- Other Revenue
- Fixed Staffing
- Wages**
 - Hours Distribution
 - Wage Rate
 - Salaries By Pay Type**
 - Job Code
 - Summary
- Salaries Summary
- Non-Staffing Expense
- Spreads
- Workspace

AF	AG	HC	HD	HE	HF	HS	HT	HU	HV	HW	IJ
Salaries By Pay Type											
JobCode		Actual 2023	Budget 2024	Actual YTD 2024	Projected 2024 Dollar Adj.	Projected 2024	Baseline Budget 2025		Budget 2025 Dollar Adj.	Budget 2025	
23	PS-60004 - Distinguished Professor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
Productive											
36	Regular	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
37	Overtime	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
38	Orientation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
39	Other Productive 2	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
40	Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
41	Other Productive	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	
42	Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	

Wages > Salaries By Pay Type, cont.

For Faculty from FRB, you will **NOT** input any additional amounts directly in Strata. **The only exception** is for the Medical Insurance Reimbursements (MPR). See next slide.

1. “Dollars-Only > MD Incentive” is where the clinical incentives will populate from FRB.
2. “Dollars-Only > Dollars Only – Staffing” is where the additional duties/ECC agreement will populate from FRB.



Navigation

- Reports
- Global Methods
- Other Revenue
- Fixed Staffing
- Wages
- Hours Distribution
- Wage Rate
- Salaries By Pay Type
- Job Code
- Summary
- Salaries Summary
- Non-Staffing Expense

UNCFP-412620 - Dermatology-Research

Close Save Save & Close Print... Find... Other Tools

	AF	AG	HC	HD	HE	HF	HS	HT	HU	HV	HW	IJ	IK	IL	IM	IN
18																
19																
20																
21																
22																
23																
24																

Salaries By Pay Type

JobCode	Actual 2023	Budget 2024	Actual YTD 2024	Projected 2024 Dollar Adj.	Projected 2024	Baseline Budget 2025	Budget 2025 Dollar Adj.	Budget 2025	Comments
PS-600004 - Distinguished Professor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

Scroll down

116	Dollars-Only	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
117	Bonus	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
118	MD Incentive	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
119	Bonus-Longevity	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
120	Dollars Only-Staffing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

Wages > Salaries By Pay Type, cont.

- Medical Insurance Reimbursement (MPRs), and personal moving expenses can be adjusted as a lump sum amount on the Non-Staffing Expense tab. This adjustment can be made in the “Budget 2025 Detail Adj.” column

- Salaries Summary
- Benefits
- **Non-Staffing Expense**
- History Based
- Zero Based
 - Historical
 - Projected
 - Baseline
 - Budget
 - Variance Comments
- Non Staffing Allocated
- Spreads
- Workspace

20				Actual	Budget	Actual YTD	Projection	Projected	Projected	Projected
21	Account	Rollup		2023	2024	2024	Method	2024 Detail Adj.	2024 Adj.	2024
22										
32	Units of Service			-	-	-				-
33										
34	Non-Staffing Expense									
35										
36	512520-000P - SHRA Severance Wages	Salaries and Wages Fixed		\$ -	\$ -	\$ -	Default	\$ -	\$ -	\$ -
58	517110-000P - Taxable Empl Expense Reimb...	Employee Benefits Fixed		\$ 34,990	\$ 840	\$ 4,475	Default	\$ -	\$ -	\$ 8,950
80	517140-000P - Personal Moving Expense Rei...	Other Supplies and Servi... Fixed		\$ 8,450	\$ 33,450	\$ 10,465	Default	\$ -	\$ -	\$ 20,930
102	522450-000P - Video Support Services	Communication and Utili... Fixed		\$ -	\$ -	\$ 250	Default	\$ -	\$ -	\$ 500

Salaries Summary

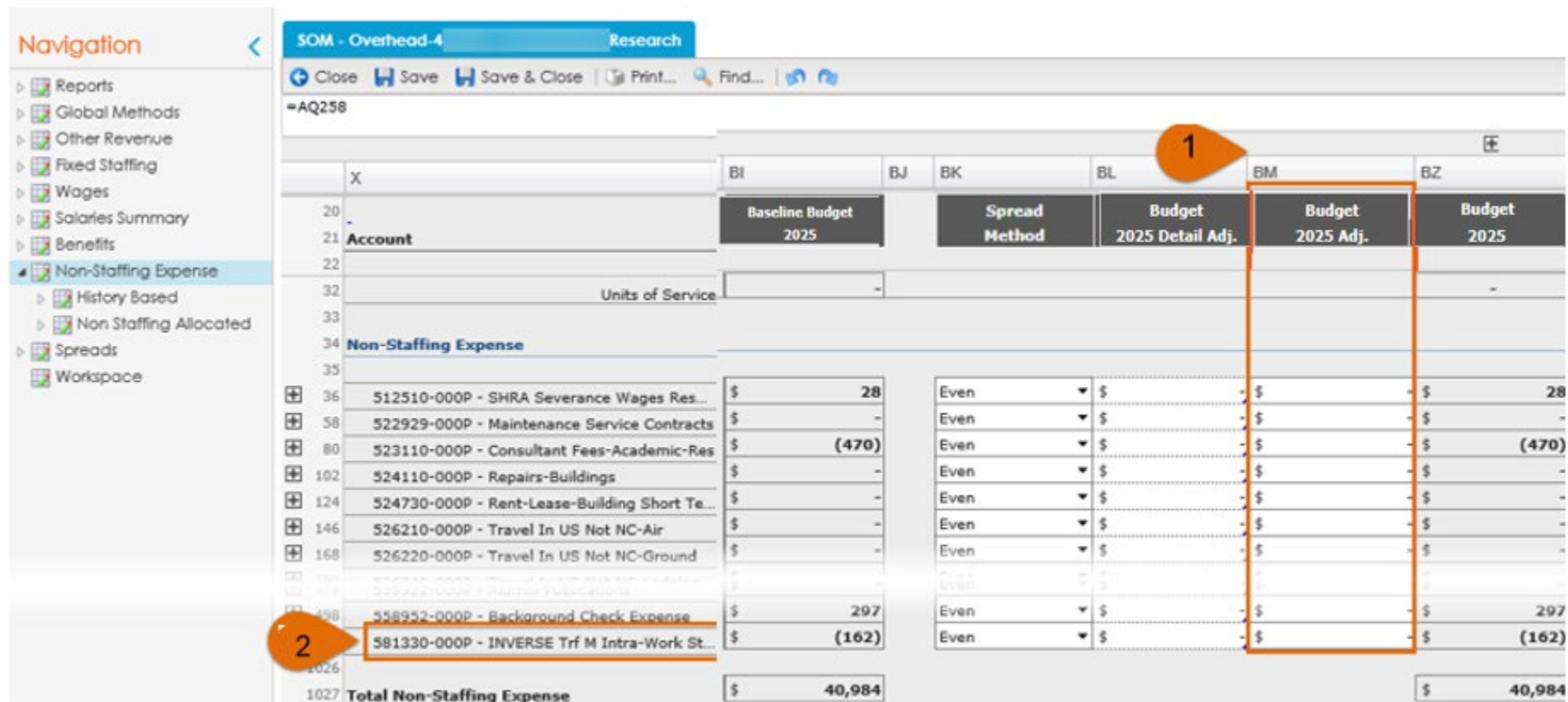
- There could be difference in the amounts depending on which salary summary you are reviewing. This is due to where the data comes from.
 - The “*Summary by Pay Code Group*” tab is an accrual view for bi-weekly employees and does not include PAATs
 - The “*Summary by GL Account*” is a financial view and will tie to your Income Statement reports

Benefits

- **Adjustment to benefits cannot be made by end-users. Please contact your FP analyst to adjust benefit rates.**

Non-Staffing Expense

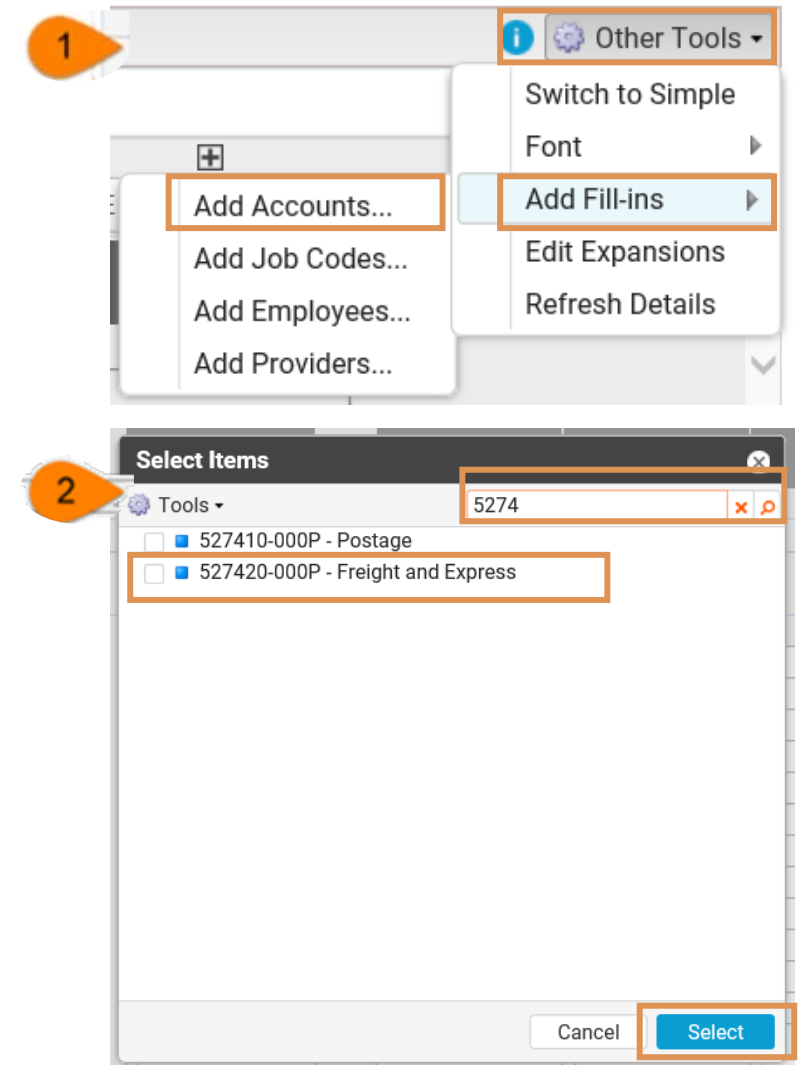
1. Add/decrease the amount in each account code line by entering the amount in the "Budget 2025 Adj." column.
2. **To note:** you will need to enter the opposite sign for account codes with "INVERSE" in the description



	X	BI	BJ	BK	BL	BM	BZ
		Baseline Budget 2025		Spread Method	Budget 2025 Detail Adj.	Budget 2025 Adj.	Budget 2025
20							
21	Account						
22							
32	Units of Service						
33							
34	Non-Staffing Expense						
35							
36	512510-000P - SHRA Severance Wages Res...	\$ 28		Even	\$ -	\$ -	\$ 28
58	522929-000P - Maintenance Service Contracts	\$ -		Even	\$ -	\$ -	\$ -
80	523110-000P - Consultant Fees-Academic-Res	\$ (470)		Even	\$ -	\$ -	\$ (470)
102	524110-000P - Repairs-Buildings	\$ -		Even	\$ -	\$ -	\$ -
124	524730-000P - Rent-Lease-Building Short Te...	\$ -		Even	\$ -	\$ -	\$ -
146	526210-000P - Travel In US Not NC-Air	\$ -		Even	\$ -	\$ -	\$ -
168	526220-000P - Travel In US Not NC-Ground	\$ -		Even	\$ -	\$ -	\$ -
198	558952-000P - Background Check Expense	\$ 297		Even	\$ -	\$ -	\$ 297
2026	581330-000P - INVERSE Trf M Intra-Work St...	\$ (162)		Even	\$ -	\$ -	\$ (162)
1027	Total Non-Staffing Expense	\$ 40,984					\$ 40,984

Non-Staffing Expense – Adding Account Code

1. If you find you need to add an additional account code, navigate to “Other Tools” on the top right side of the screen within the Fixed Staffing tab. Select “Add Fill-ins” > “Add Accounts”
2. Search for the account code you want to add. Click on the desired account code and click “Select”. This will input the account code within the workbook. **Be sure to save your workbook after adding this account code to ensure it remains.**



Reviewing the UNCFP Income Statement & Other Reports

UNCFP Income Statement Overview

There are two Income Statement reports. Data in these reports will be updated once edits are made to your budget.

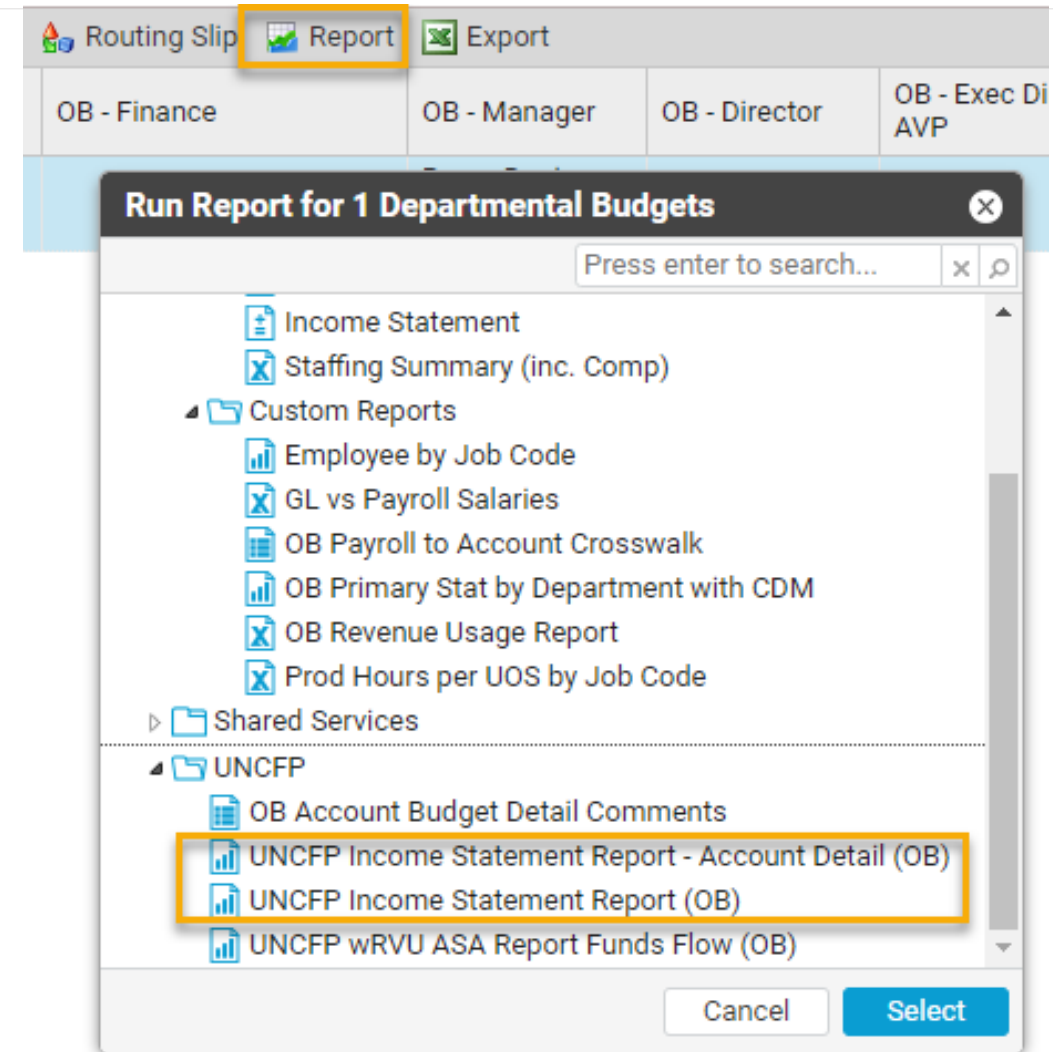
FP Reports

1. FP Income Statement:
2. FP Income Statement – Account Detail

UNCFP Income Statement Overview

From the OB home page, click the “Report” tab. A new window will appear. Select the “**UNCFP Income Statement**”

Please note: the report will pull the data for the entity you have selected (i.e., highlighted blue on your OB Home screen). If you want to see multiple entities at once in the Income Statement reports, select multiple entities before clicking “Report”.



Other Strata Reports

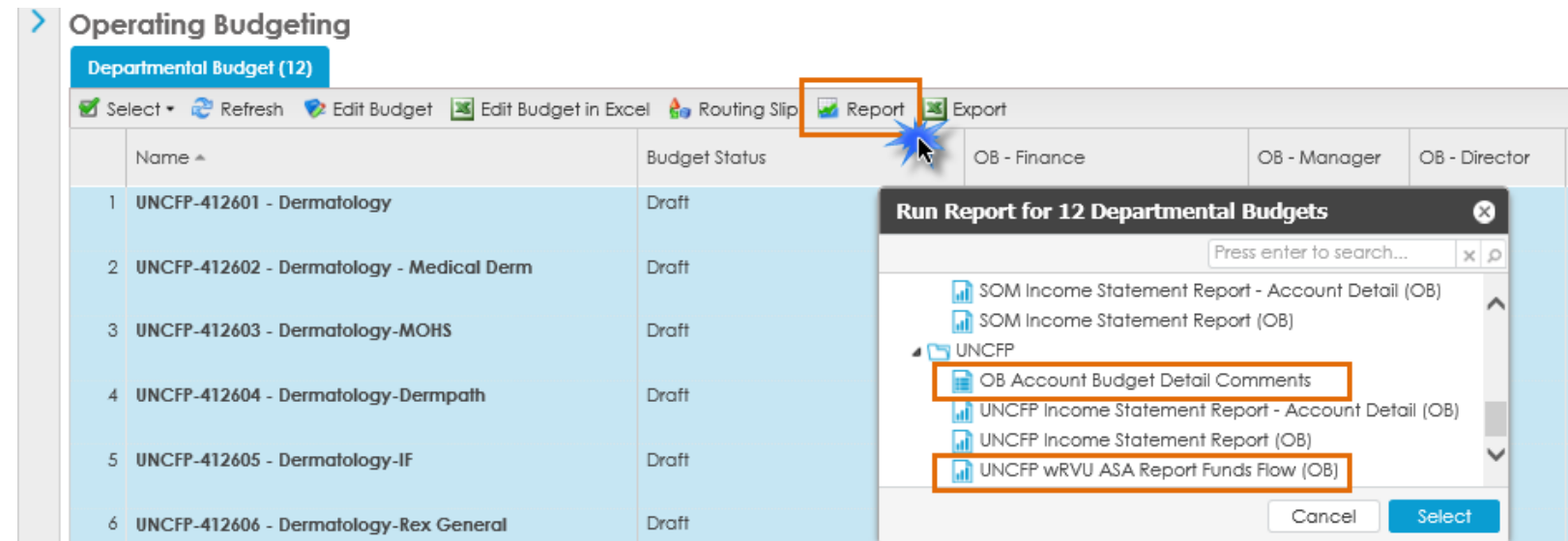
OB Account Budget Detail Comments

- To view the comments entered in “Other Revenue” and “Non-Staffing Expense” tabs vs. going through each individually

UNCFP wRVU ASA Report Funds Flow (OB)

- Used to see wRVU and ASA Units by Provider vs. going through each individually

Navigate to the “Reports” link. Scroll down to the “UNCFP” reports. Click the report name to open.



The screenshot displays the 'Operating Budgeting' interface. At the top, there is a navigation bar with buttons for 'Select', 'Refresh', 'Edit Budget', 'Edit Budget in Excel', 'Routing Slip', 'Report', and 'Export'. The 'Report' button is highlighted with an orange box. Below the navigation bar is a table with columns for 'Name', 'Budget Status', and 'OB - Finance', 'OB - Manager', and 'OB - Director'. The table lists six departmental budgets, all with a 'Draft' status. A 'Run Report for 12 Departmental Budgets' dialog box is open, showing a search bar and a list of reports. The 'UNCFP' folder is expanded, and two reports are highlighted with orange boxes: 'OB Account Budget Detail Comments' and 'UNCFP wRVU ASA Report Funds Flow (OB)'. The dialog box has 'Cancel' and 'Select' buttons at the bottom.

Name	Budget Status	OB - Finance	OB - Manager	OB - Director
1 UNCFP-412601 - Dermatology	Draft			
2 UNCFP-412602 - Dermatology - Medical Derm	Draft			
3 UNCFP-412603 - Dermatology-MOHS	Draft			
4 UNCFP-412604 - Dermatology-Dermpath	Draft			
5 UNCFP-412605 - Dermatology-IF	Draft			
6 UNCFP-412606 - Dermatology-Rex General	Draft			

Other Reports (Outside of Strata)

FRB Reports

- Use these reports to tie out what you've input in FRB to what's loaded in Strata

SOM Funding Report (Tableau)

- Use this report to review actuals on how a person was funded and to project out how they will be funded

FY25 Budget Website as Resource

Finance and Business Operations

To search, type and hit enter.

Search

Search this site Search UNC School of Medicine

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[Home](#) / [FY25 Budget Process](#)

FY25 Budget Process

<https://www.med.unc.edu/fbo/fy25-budget/>