Agenda

- PBCS Overview
- Using PBCS Workspace
- Reports
- Position Budget Forms
- Fringe Calculations
- Transfer Forms
- Department Budget Forms
- Reconciliation of Changes
- Contacts and Resources
PBCS Overview
What is PBCS?

– Planning and Budgeting Cloud Service is a budgeting and planning application that allows users to:

• Identify proposed revenues and expenditures for the upcoming fiscal year.

• Compare current and prior year’s operating budgets.

• Manage position related data such as salary, distribution allocation, and position status (filled or vacant).
FY21 budget will be completed in PBCS.

– A copy of the FY20 operating budget listing revenues, expenses, and transfers will be loaded in PBCS.

– Any changes or updates made in PBCS are effective for the new budget year starting September 1, 2020.
Budget Administrators are responsible for:

- Reviewing Position information to ensure all budgeted positions and employees are included in the new budget year.
- Updating Intrafund Transfers on a “Source” basis.
- Reconciling Revenues and Expenses for each Cost Center.
Steps to Completing Budget

- Salary Roster Report (Reports)
- Position updates (Position Budget Forms)
- Fringe Calculations (Other Position Types and Departmental Budget Form)
- Intrafund Transfers (Transfers Forms)
- Department Budget updates (Departmental Budget Form)
- Reconciliation of Changes (Reconciliation of Changes Worksheet)
Using
PBCS Workspace
Getting Started

Browser Requirement

- PBCS is compatible with Mozilla Firefox and Google Chrome.
- Do not use Internet Explorer or Safari.
- You must enable popups.

Log in to PBCS Test (Training) Site:

- [https://planning-test-a522191.pbc.us2.oraclecloud.com/HyperionPlanning](https://planning-test-a522191.pbc.us2.oraclecloud.com/HyperionPlanning)
- Use the [Company Sign In](https://planning-test-a522191.pbc.us2.oraclecloud.com/HyperionPlanning) button.
- Login with your UTA email and NetID password.

Note: The URL is case sensitive
Using PBCS Workspace

PBCS Homepage:
- To begin, you MUST start on the PBCS Homepage.
- The Homepage is where you can access position data and employee data, set user preferences, and view data forms for budgeting.
Using PBCS Workspace

Planning and Budgeting Cloud: BDGTANAL

January 3, 2019
Welcome

Test Environment Warning
You are accessing the PBCS Test Environment.
This is the non-production PBCS environment.

Activity    Recent    Favorites

2          Announcements

You should monitor the Announcements Box for updates regarding PBCS.
Setting User Preferences

• From the main page, select Tools

Select User Preferences
Preferences – Display Preferences
- Display preferences page is used to set the Number Formatting for the data forms:
  • Thousands Separator – Select “Comma”
  • Decimal Separator – Select “Dot”
  • Negative Sign – Select “Prefixed Minus”
  • Negative Color – Select “Red”
  • Page Options – Indent based on hierarchy

NOTE: Click on the Save button to save updated User Preferences.
Icons and tabs read left to right

Only one position form needs to be used (Department, Cost Center, or Position Focus). A change on any one of the forms updates all the forms.
Navigation Icons

1. Search Page
2. Edit Members
1. Search Page Icon

- Click on the magnifying glass icon.
- Enter search parameter.

- Line will be highlighted.

NOTE: This function allows for text and/or numbers search only on the displayed form.
2. Edit Members Icon (Option 1)

- Click on the pencil icon.
- The current form Department name is displayed. Click on the arrow for the Drop Down box.

- A list of all departments will be shown. You will only see data for areas you have security rights to.
- Select the correct department and click the Apply button.
- The page will refresh automatically.
2. Edit Members Icon (Option 2)

- Click on the pencil icon.
- The current form Department name is displayed. Click on the Member Selector icon.
  - A drop-down list is displayed of areas within your approved security.
• Select the needed member name.
• Click the OK button.
• The new member name is displayed highlighted in yellow (Changed, but NOT saved.)

• Click the GO icon.
• The new member name appears in white which indicates the form has been updated.
Reports
Salary Roster

Users have access to view, print, and download a salary roster report in HTML, PDF, or XLS format.

- From the main page, click on Reports.
### Salary Roster for Selected Dept – Dept Users

**File Format:** PDF

**Department:** 320103

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>Total New and Existing Positions</th>
<th>Employee Name</th>
<th>Employee ID</th>
<th>A&amp;P Salaries</th>
<th>Classified Salaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>200018 OFFICE OF BUDGETS &amp; PLANNING</td>
<td>10010220 ASSISTANT DIRECTOR BUDGET &amp; Fi</td>
<td>Scammell,Betty J</td>
<td>10010220</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200018 OFFICE OF BUDGETS &amp; PLANNING</td>
<td>10015907 BUDGET ANALYST</td>
<td>Speights,Amy Earl</td>
<td>10015907</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200018 OFFICE OF BUDGETS &amp; PLANNING</td>
<td>10016025 Senior Fin Analyst-Budget</td>
<td>Dennis,Debbie</td>
<td>10016025</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200018 OFFICE OF BUDGETS &amp; PLANNING</td>
<td>10016110 Administrative Assistant II</td>
<td>Allen-Franklin, Tanisha Michele</td>
<td>10016110</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200018 OFFICE OF BUDGETS &amp; PLANNING</td>
<td>10016244 SENIOR DIRECTOR</td>
<td>Cary, Virginia Sue</td>
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<td></td>
</tr>
<tr>
<td>200018 OFFICE OF BUDGETS &amp; PLANNING</td>
<td>10017316 BUDGET ANALYST</td>
<td>Parrott, Patricia</td>
<td>10017316</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• The file format dropdown menu allows the selection of PDF, HTML, and Excel file output.

• The dropdown menu below the Department selection box allows for HTML Preview and Export to Excel.

• The icon bar allows printing or downloading the report.
• Depending on the format chosen, the report will be displayed or will be saved/opened and saved in Excel.
• Click on the “University of Texas Arlington” logo to return to the home page.
• Note: The “Salary Roster for Selected Dept – Dept User POST FINAL” report is view only and displays any changes made by Budgets after the budget cycle is closed.
Position by Version for Selected Dept

This report gives a history of changes for each position throughout the budget year. For selected year and department (or group of departments), the report shows employee position detail by position/cost center for each version and datatype (from Working version/Baseline Budget datatype to Post Final version/Budget Office Adjustments datatype).
Position Budget Forms (within Departmental Budget)
From the Home Page, select **Departmental Budget**. Then select **Position Budget Forms**.
The **Position Data** forms are used to view and edit position data in a department.

Position data can be displayed by Department, Cost Center, or Single Position Focus. *Updates to one form copies to all forms.*

Positions are pulled into PBCS by **Funding** Department and Cost Center (which may not be the owner of the position).

Split funded positions will show the other funding side if department is the same or by using the Single Position focus form if the departments are different. If the other funding department(s) is not within security, can only see attributes not associated with the Comp Data.

Budget Administrators must review and make the necessary changes to the position data forms, such as:

- Add new hires or transfers
- Change funding allocation
- Make salary changes
- Fill or Vacate a Position
- Budget Other Position Types (Part-time, Faculty, Wages, etc.)
The **Positions** forms are used to manage positions.

The forms provide information such as:

- Employee Name and Employee ID
- Position Name and Number
- Position Status (Filled, Vacant)
- Employee Class and FTE
- Owning Department

Note: Changes on one form updates all forms.
Employee Classes

A&P - Administrative & Professional
CL - Classified
CLN – Classified Paid Hourly
FA1 – Faculty (Regular/Tenure/Tenure Track)
FA2 – Faculty Non-Tenure Track
Position Forms

Full-Time Equivalent and Headcount

Full-time Equivalent (FTE)

- Full-time or 1 FTE – 40 hours per week filled position
- Part-time or 0.5 FTE – 20 hours per week vacant position

Headcount (The physical body in a position)

- Full-time Position and 1 Headcount – 40 hours per week filled position
- Part-time Position and 0 Headcount – 20 hours per week vacant position
Position Forms

Existing Position by Department

- Existing positions can be edited by typing new information.

- To edit existing position information, click in a cell in the first column to select the row.

- Used when filling a vacant position that is already listed, updating salary, updating distribution percentage with no change to the combo code.
## Position Forms

### Additional Actions to Existing Position

<table>
<thead>
<tr>
<th>Department</th>
<th>Version Working</th>
<th>Data Type</th>
<th>Employee Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyst I</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analyst II</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Analyst</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Spec</td>
<td>315132 Knowledge Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialist</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deputy Director</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant</td>
<td>315132 Knowledge Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analyst I</td>
<td>310172 BUS AFF TECHNOLOGY</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Actions:
- Clear Empty Blocks (Rows)
- Copy Position
- Transfer Position
- Delete Position
- Vacate Position
- Transfer Employee (and Vacate Source Position)
- Positions by Department
- Positions by Cost Center
- Position Focus
  - Edit
  - Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
Position Funding Change

- If the position changes funding from one department/cost center to another department/cost center and the user has security access to both areas, then use Transfer Position.

  ![Action Menu - Transfer Position Ruleset]

  - If the department user does not have security access to make changes in both departments, the transfer process cannot be used. The Source department will need to delete the position using the Delete Position.

  ![Action Menu - Delete Position Ruleset]

The new department will add the Position to their budget using the “New Position” forms and add the UT Share Position ID in the comments for tracking purposes.

- If the position is filled, the fringe attributes will follow the employee to the destination department/cost center.
NOTICE

Ensure the correct Department and Cost Center combo has been selected before entering any Position and Transfer amounts.
Split-funded Positions

– Each department that partially funds a position will take responsibility for budgeting their portion of the split position.

– Each department manages only their portion and can see only their portion of the position unless they have access to both areas. Using the Single Position Focus section will show the other funding departments, so that a department will know all the funding sources. (Does not show other departments monetary portion of the funding).

– No audit is in place to know whether a position is budgeted in full (100%) or has matching comp rates.

– Communication with the other department is necessary.
Employee Transfers

- If the employee transfers from one position to a vacant position within the same department or within a department that the user has security access to, use Transfer Employee (and vacate source position) action. (Employee attributes follow).

  ![Action Menu - Transfer Employee Ruleset]

- If the employee transfers from one position in one department to a position in a different department that the user does not have security access to, the transfer process cannot be used. The Source department needs to vacate the position using the Vacate Position action. The Destination department needs to add to the destination position with the employee attributes.

  ![Action Menu - Vacate Position Ruleset]

Note: May need to adjust salary and distributions if required. Fringe will not follow the employee in this situation and will need to be evaluated.
The **New Position** form is used to enter a new position(s) for a department.

**CONFIRM YOU HAVE SELECTED THE CORRECT DEPARTMENT AND COST CENTER COMBO FIRST.**

Enter the first new position in the **New Position 1** line.

Provide all needed information to push position to the existing Position forms:
- Employee Name and Employee ID
- Employee Class (Faculty, Classified, A&P)
- Owning Department
- Head Count and FTE**
- Comp Rate and Distribution
- Coverage code and benefit plan if known.

Ensure that you **SAVE** the updates.

The new position will appear in the **Existing Position by Department** and **Existing Positions by Cost Center**.

**NOTE:** If the Combo Code does not automatically load, there is a mismatch between the department and cost center.
Other Position Types

The Other Position Types data form allows for salary budgeting not specifically associated with position IDs but as a whole number along with the proposed associated fringe amounts for part-time faculty, wages, GRA/GTA’s, etc.

Confirm you have selected the correct Department and Cost Center combo, then enter the whole amount for the specific position along with the fringe expense (calculated using a 3% average). Once entered, the amounts will be visible on the departmental budget forms.

Additional Fringe Adj. is for those departments wishing to budget additional fringe dollars not associated to any salary specification.
Enter comp rate and fringe as total dollar amounts.

Additional fringe adjustments can be added as a whole dollar amount.
Class Activity

- Use the Departmental Budget > Position Budget Forms to view and update your position data
- Change Funding Source
- Add a New Position
Fringe Calculations and Rates
Fringe Calculations and Rates

- **Filled Budgeted Positions** - Fringe rates for filled budgeted positions are automatically updated with the employee’s current elections at the time the position data is pulled from UT Share and loaded into PBCS. Users do not have access to modify the fringe rates for filled budgeted positions.

- **Employee Transfers** - Fringe rates for filled budgeted positions will follow an employee who is transferred during the budget process.

- **Vacant Budgeted Positions** - Fringe rates for vacant budgeted positions are calculated using TRS as the retirement option and a weighted average for health insurance. Users do not have access to modify the fringe rates for vacant budgeted positions.

- **Other Position Types** - Other position types include part-time faculty, wages, graduate students, etc. Fringe rates will need to be manually calculated using the average of 3%. Users do have access to modify the fringe rates for other position types. Entry of fringe rates amounts is on the Other Position Types form.**

- **Additional Fringe Budget** - Additional fringe budget can be added on the Other Position Types form in the Additional Fringe Adj. cell if necessary.
Budget Transfers
To manage transfers, click on the Transfer Forms icon.

- Transfer updates are input into the **Intrafund Transfer Out – Add Transfer** form ONLY.
- The Cost Center Transfer Summary tab, Intrafund Transfer Out ZS tab, and the Intrafund Transfer In – View Transfer tab are for summary and view ONLY.
- All transfer information needs to be entered in FY21.
Transfers appear on the Departmental Budget Form
- Transfers Out reflect on 71400 GL
- Transfers In reflect on 70400 GL

Transfer Out/In Definitions
- Transfers Out refers to source Cost Center
- Transfers In refers to the destination Cost Center

Note: Review all changes on transfer forms and on departmental budget forms.
**If a department is transferring funds outside of their department, it is recommended to communicate to the Destination department.**
Class Activity
• Complete Budget Transfer
Departmental Budget Forms
Icons and tabs read left to right.

Changes made on position and transfer forms update Departmental Budget form in real time.
The Departmental Budget Form provides revenues and expenditures for the current and prior year budgets.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>C313255 : 313255 OIT Business Support Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY19</td>
<td>FY20</td>
</tr>
<tr>
<td>Budget</td>
<td>Budget</td>
</tr>
<tr>
<td>Year Total</td>
<td>Year Total</td>
</tr>
<tr>
<td>Post Final</td>
<td>Post Final</td>
</tr>
<tr>
<td>Office Total</td>
<td>Office Total</td>
</tr>
<tr>
<td>FY21</td>
<td>FY21</td>
</tr>
<tr>
<td>Budget</td>
<td>Budget</td>
</tr>
<tr>
<td>Year Total</td>
<td>Year Total</td>
</tr>
<tr>
<td>Working</td>
<td>Working</td>
</tr>
<tr>
<td>Post Final</td>
<td>Post Final</td>
</tr>
<tr>
<td>Baseline</td>
<td>Permanent Additions</td>
</tr>
<tr>
<td>Department</td>
<td>Department Baseline</td>
</tr>
<tr>
<td>Working Total</td>
<td>Dept Working vs Dept BL Incr (Decr)</td>
</tr>
<tr>
<td>Office Total</td>
<td>Office Total</td>
</tr>
</tbody>
</table>
Budget Administrators must review and make the necessary changes or adjustments to the Departmental Budget Form by Cost Center, such as:

- Review Department Baseline Column. Provides updated total budget amount for FY21.
- Verify the salary totals. If changes are required in salaries, return to appropriate form to make changes.
- Enter estimated income if applicable.
- Verify transfer totals. If changes are required, return to the transfer form to make changes if you are the source of the funds OR follow-up with appropriate department if you are the destination.
- Enter estimated expenses not tied to a form, e.g. travel, M & O, etc.
- NOTE: Your total income and expense **must** equal zero unless you have been granted an exception.

**NOTE:** Adjustments to State Appropriation, Designated Tuition, or Student Service Fees can only be made by the Budget Office.
Department Budget Forms ZS

- This form can be used to budget lump sum M&O, Travel, Scholarships and Reserve dollars at the summary “B” account level.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>C313255 : 313255 OIT Business Support Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY19 Budget</td>
<td>FY20 Budget</td>
</tr>
<tr>
<td>Year Total</td>
<td>Year Total</td>
</tr>
<tr>
<td>Post Final</td>
<td>Post Final</td>
</tr>
<tr>
<td>Office Total</td>
<td>Office Total</td>
</tr>
</tbody>
</table>

- **B4000 - Maintenance & Operations - Budget Input**
  - FY19: 1,178,439
  - FY20: 1,178,439
  - FY21: 1,178,439

- **Travel Expense**
  - B4100 - Travel - Budget Input
  - B4300 - Scholarships & Fellowships - Budget Input
  - **Scholarships & Fellowships**
    - B4400 - Capital - Budget Input
      - **Capital**
        - Operating Expenses
          - Total Expenses
Departmental Budget Form ZS with GL

- This form can be used to budget M&O, Travel, Scholarships and Reserve at the GL account level.

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>FY19 Budget</th>
<th>FY20 Budget</th>
<th>FY21 Budget</th>
<th>FY21 YearTotal</th>
<th>FY21 Working</th>
<th>FY21 Post Final</th>
<th>Department Baseline</th>
<th>Department Working Total</th>
<th>Dept Working vs Dept BL Incr (Decr)</th>
<th>Office Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>C313255 : 313255 OIT Business Support Training</td>
<td></td>
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<tr>
<td>83003 - Office/Computer Supplies</td>
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<td>700</td>
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<tr>
<td>63141 - Computer Software Expenses</td>
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<tr>
<td>63163 - Computer Equip Controlled</td>
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<td>63832 - Telecomm Long Distance</td>
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<tr>
<td>63833 - Telecomm Monthly Charge</td>
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<tr>
<td>63822 - Maint Repair Software</td>
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<tr>
<td>67645 - Registration Fees Employee</td>
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</tr>
</tbody>
</table>
Departmental Budget – All KK/GL Accounts

This form is used to add a GL account that has not been used in the previous budget years.

*An update on one form updates all forms*
Longevity

- Longevity is not included in the fringe benefits calculations.
  - Longevity can be budgeted on either the Departmental Budget Form ZS or Departmental Budget Form ZS with GL.
  - Users need to estimate the longevity expense and enter for designated, service, auxiliary, and restricted cost centers.
The Budget information loaded back in to UTShare will be rolled up to the Budget Account level (e.g. A1000, A2100, A2000, A3000, A4000).

This image displays expense Budget Accounts and the associated general ledger accounts.
Class Activity

- Edit Departmental Budget Form
- Add new GL Account
Reconciliation of Changes
Budget Administrators must complete the “Reconciliation of Changes” worksheet. This worksheet will summarize the changes between FY20 and FY21 entered in the PBCS system to facilitate the review of your department by the Budget Resource.
The reconciliation of changes worksheet is to be completed for each budgeted department/cost center. The template can be downloaded from the Budgets, Planning and Analysis web page. Instructions are included in the template.

Steps for reconciling changes to your department/cost center:
1. “Save as” a copy of the template to use for your own department/cost centers.
2. Add department name, department number and cost center number.
3. Copy the amounts from PBCS FY20 Budget Post Final Departmental Budget Form into the original FY21 budget column.
   a. You may need to adjust formulas on the worksheet.
4. Add adjustments to your budget in the ‘Adjustment Amount’ column.
5. Add descriptions for all adjustments. Refer to the template for examples of descriptions.
6. Add the funding source for all adjustments.
7. Review the New FY21 Budget column for accuracy.
8. The amounts in the New FY21 Budget column should match the Department Working Total column in PBCS.
9. Totals for each FY20 and FY21 should equal zero (net revenue minus expenses, including transfers in/out).
10. Send your worksheets to your budget resource by the due date on the budget process calendar.

Note: DO NOT submit unbalanced worksheets to your budget resource.
In today’s class, we covered...

- Setup and basic navigation for PBCS.
- How to run a Salary Roster Report.
- How to update Position Budget Forms.
- How to update Transfer Forms.
- How to reconcile and update Departmental Budget Forms.
- How to complete the Reconciliation of Changes worksheet.

Here’s your budget checklist...

- Review and update position data for your Cost Center using the Existing Position by Department or Cost Center forms along with the Other Position Types and New Position Forms (if applicable).
- Review and update the Departmental Budget Form for each Cost Center and ensure the revenue minus expense equals zero.
- Make sure the total dollar amount of salaries correctly carried forward to the Departmental Budget Forms totals. Adjust other expenses as necessary to stay within the approved baseline budget.
- Complete the Reconciliation of Changes worksheet for each budgeted Cost Center.
Contacts & Resources
For budget questions or help with PBCS, contact your budget resource representative:

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone Ext</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ginnie Cary</td>
<td><a href="mailto:cary@uta.edu">cary@uta.edu</a></td>
<td>2-0929</td>
</tr>
<tr>
<td>Debbie Dennis</td>
<td><a href="mailto:dpennington@uta.edu">dpennington@uta.edu</a></td>
<td>2-3891</td>
</tr>
<tr>
<td>Crystal Garner</td>
<td><a href="mailto:cgarner@uta.edu">cgarner@uta.edu</a></td>
<td>2-7235</td>
</tr>
<tr>
<td>Adriana Martin</td>
<td><a href="mailto:adriana.martin@uta.edu">adriana.martin@uta.edu</a></td>
<td>2-7212</td>
</tr>
<tr>
<td>Patty Parrott</td>
<td><a href="mailto:pattyp@uta.edu">pattyp@uta.edu</a></td>
<td>2-9497</td>
</tr>
<tr>
<td>Betty Scammell - Summers</td>
<td><a href="mailto:scammell@uta.edu">scammell@uta.edu</a></td>
<td>2-6033</td>
</tr>
</tbody>
</table>

Note: Refer to the Budget Resource List on the Budgets, Planning & Analysis Resources document if you do not know who your Resource is.
Contacts & Resources

**Budgets, Planning and Analysis:**
- Web page: [https://www.uta.edu/business-affairs/budgeting/](https://www.uta.edu/business-affairs/budgeting/)
  - View Budget Process Calendar
  - Print/download Reconciliation of Changes Worksheet
  - Fringe Benefits Rates

**Business Technology Services:**
- Web page: [https://www.uta.edu/business-affairs/training/](https://www.uta.edu/business-affairs/training/)
  - Register for Classes
  - Join Business Affairs Listserv
  - View and/or Print Training Materials
    - PowerPoints
    - Training Guides
    - Job Aids