SUNY DOWNSTATE MEDICAL CENTER

FY 2019-2020
Internal Budget Process

Lawson Budgeting and Planning (LBP) Guide
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Sections

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Login

Login Link can be found on Downstate Web Page:

Click Administration > Finance Division > Links > Downstate Medical Center Links >
Lawson Budget & Planning System-Production database. Reminder: use the FY 19/20-Budget database to complete your budget in.

Enter your user name and password (same as PC log-in).

- **Budgeting Help:** During the budgeting process if you have questions or need assistance, please send an e-mail to BudgetHelp@downstate.edu
- **Remote Access:** To access LBP remotely, you must be connected to your DMC desktop using VPN access. For VPN access, please email the IS help desk: helpdesk@downstate.edu and request to be provided with VPN access.
- **MAC Users** - LBP will only work with Internet Explorer (if you need access to a computer for budget preparation, please send an e-mail to BudgetHelp@downstate.edu
- **All Users:** LBP will only work with Internet Explorer. Do not use Mozilla Firefox.
Introduction

Downstate Medical Center will be using Lawson Budgeting and Planning (LBP) for the FY 19/20-Budget Cycle.

The three main budgeting steps are:

1. Review Personal Services.

2. Review Contractual OTPS Obligations.

3. Enter rest of the OTPS Requests.

Note: All Agency requests should be entered on Object Code “5842-Manpower Services” using the display detail lines button to enter Agency requests by FTE’s and titles.

Ensure that you are entering your budget in the correct database: FY 19/20-Budget.

When you have completed your posting and budget, please review your input and click on the SAVE icon to save your completed work.
SUNY Downstate Medical Center Budget Process

• Review AU’s

• PS Information

• FOR ACADEMIC-COM AND GRAD SCHOOL – Do not change the PS information. Contact COM Leadership for any issues/concerns with projected salaries
  – View PS Summary Information
  – Review current positions and employee records
  – Review/adjust employee salary AU distribution
  – Vacant and New Positions—with a few exceptions, in lieu of entering this data into LBP, a separate template will be used for any Vacant or New Positions

• OTPS Details and PS (non-workforce)
  – Enter a Budget Request (OTPS and PS non-workforce)
  – Enter budget detail lines
  – Any consulting contract should be posted to Object Code “5813-Consultants” (needs to be reported to SUNY on an annual basis)
  – All Agency requests should be entered on Object Code “5842-Manpower Services” using the display detail lines button to enter Agency requests by FTE’s and titles

• SHARED SERVICES-*New This Year*
  – Shared Services salary will be preloaded in all 3 funds this year: IFR, State and Hospital
  – Any Salary on IFR Account will remain
1. Only use Internet Explorer
2. Ensure you prepare your Plan View Setup for FY 19/20-Budget database
3. Object code “5813-Consultants” should be used for CONSULTANT CONTRACTS ONLY
4. Shared Services are being preloaded into all 3 funds this year: IFR, State and Hospital
5. Increases and retro payments have been preloaded in the Workforce Tab for those Bargaining Units that have contracts; funds will be held in reserve for those Bargaining Units without a finalized contact. (See page 29 for more details).
6. With a few exceptions, a separate process will be used in lieu of entering any Vacant or New Positions (funded or unfunded) into LBP. Any of these positions will need to be approved prior to the data being entered in LBP. This information will be entered into LBP by the Budget Office. (See page 34 for more details).
7. OTPS expenses must be entered into the appropriate object code – Benefit – Travel budgets that are approved do not need the CFO’s approval
8. All Procurement Card AUs must be budgeted
9. If you are planning to spend from an IFR you must budget for it
10. Narrative must be submitted with your budget submission
11. Department should submit their Department’s Table of Organization
12. Budget submission due May 15, 2019
LBP Main Screen

Infor Lawson Budgeting & Planning

Finance Plan

My Plan  Financial  Workforce

Accounts  

361325-DSRIP

<table>
<thead>
<tr>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>19/20-Budget</td>
</tr>
<tr>
<td>Total Expenses</td>
</tr>
</tbody>
</table>
The First Way to Open an Accounting Unit (AU)

1. Click on MY PLAN button (1)
2. Type in AU for the Budget you want to work on (2)
3. Click on AU here to open the Budget you want to work on (3)

The First Way to Open an Accounting Unit (AU)

1. Click on MY PLAN button (1)
2. Type in AU for the Budget you want to work on (2)
3. Click on AU here to open the Budget you want to work on (3)

Click on AU here to open Budget

TYPE ACCOUNTING UNIT FOR THE BUDGET YOU WANT TO WORK ON

CLICK ON AU HERE TO OPEN BUDGET

DMC-MASTER-361325-DSRIP

2018 19/20-Budget

Total Expenses 1,500,087
Second Way to Open An Accounting Unit (AU)

Click on the 📊 icon to open Accounting unit (AU) directly as well.

Type in AU and Click on Find.

Click OK once the AU appears.
There are two tabs to work from when completing your budget: the FINANCIAL tab and the WORKFORCE tab.

1. FINANCIAL TAB - Shows budget in summary view
2. WORKFORCE TAB - Shows detailed staff budgets
Preparing Plan View for FY19/20-Budget Dataset

STEPS TO OPEN UP BUDGET

1. Click on PLAN button (1)
2. Click on RESTORE TO DEFAULT (2)
3. Click ON SPECIFY DATASET (3)

continued on next page
4. SCROLL DOWN to select budget (4)
5. Click OK (5)
6. Click ADD TO PLAN VIEW (6)

continued on next page
Preparing Plan View for FY19/20-Budget Dataset (continued)

7. Click ACTIVE Button (7)
8. Click OK (8)

The following datasets are available in the system for your use:

18/19-Budget
19/20-Budget - preloaded budget dataset (for data entry)

Note: To access prior year datasets: Click Plan, select the dataset from the drop down menu & Click on Add To Plan View.
Understanding the LBP Screen Components:

- There are 4 basic LBP screen components

  - My Plan View……………………………………………………………………..Pg. 16
  - Financial Tab………………………………………………………………………..Pg. 18
  - Workforce Tab……………………………………………………………………….Pg. 21
  - Navigation Path ……………………………………………………………………..Pg. 24
Once you log in, AND SELECTED THE PLAN VIEW, you will see the My Plan View for your department. The My Plan View provides rows of expenditure accounts and columns (known in LBP as “Datasets”) with information that will assist you in preparing your budget. Here you will be able to type in the Accounting Unit (AU) or the Description to open up the Budget you want to enter. Or you can just hit SUBMIT button for all Accounting Units (AU) that you have access to.

Accounting Unit (AU)

Enter name of AU you here if you do not know the AU

DMC-MASTER-31130102-DSRIP
DMC-MASTER-361325-DSRIP
Accounting Units (AU’s)

- Budgets are always updated at the posting AU level (yellow boxes indicate data entry field).
- Expand or drill down into the AU to the posting AU (lowest level).
- Click on the plus “+” sign to the left of each summary AU to expand to the next level. You are at the posting level when there are no more “+” signs to expand.
- **Note:** If you are assigned only to posting level AU’s, you will not see the AU summary hierarchy. DO NOT ENTER AGENCY EXPENSES INTO THE WORKFORCE TAB DIRECTLY OR IT WILL BE REMOVED.
• The **Financial** Tab is where you will enter:
  - OTPS (Other Than Personal Service) budget requests.
  - PS (Personal Service) non-workforce, lump-sum amounts at a non-employee level (e.g., overtime, standby, etc).

  • **Note:** Detailed calculations for employee related costs are computed in the **Workforce** Tab. The resulting summary amounts from the **Workforce** Tab are reflected in the **Financial** Tab at the account level.

• The screen below shows the **Financial** Tab is active. Note the light blue color of the active tab.
Accounts View

- Shows the roll-up of expenditure categories. Drill down to lower level accounts by clicking the (►) symbol on left of summary accounts.

- When viewing data at a summary AU level, the account view shows total data values for that summary AU. You cannot edit the data at these levels.

- When viewing data at the posting AU level you can edit and update your budget.
Posting Accounts

- Enter the AU for the Budget you want to work on
- Click Submit
- The AU will appear and then click the link to open AU
- Alternately the Posting Accounts view will automatically appear
  - It will list all of the posting accounts for that AU.
Workforce Tab

1. For entering new and changing current PS salary component $ amounts.
2. Lists all positions and employees in your Posting AU.
3. Please verify all employees in the Posting AU’s that are in your area.
4. If you are missing, existing employees that are on the current payroll, then you can add them here.
5. The **FY19/20-Budget** dataset has been pre-populated with projected PS budgets for each AU. These preloaded numbers can be edited.

---

### Finance Plan

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<thead>
<tr>
<th>ID</th>
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<th>Employee</th>
<th>Pay Rate</th>
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<th>2018 19/20-Budget</th>
<th>2018 19/20-Budget</th>
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</thead>
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<td></td>
<td></td>
<td>Headcount</td>
<td>FTE</td>
<td>Amount</td>
</tr>
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<td></td>
<td>10.00</td>
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<td></td>
</tr>
<tr>
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<td>1.00</td>
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<td></td>
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<tr>
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<td></td>
</tr>
<tr>
<td>56896</td>
<td>Prof Chmn</td>
<td>56896</td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

Preloaded Budget amounts

Click on the ID number to drill down to employee details.
Setting Up the Workforce Tab

HOW TO SET-UP THE WORKFORCE TAB

Go to Finance Plan:
1. Click on display Workforce Components (1)

When in Workforce Components:
1. Select Headcount, FTE and Amount, then Click OK (1)
Workforce Detail Account Lines

- Workforce detail lines appear when you click on a Workforce budget ID # (equivalent to “line #”)
- Each detail line represents a unique pay code. Numbers are entered into the yellow input fields to create a Workforce budget.
- **Do not make any changes to the Pay Rate.** You **MUST** have prior approval from Administration and a salary review from Human Resources, prior to making such a change. Any changes to Pay Rates will be reported Administration for review. Please submit a copy of any salary review from Human Resources when completing your budget.

![Workforce Detail Account Lines](image-url)

- Enter Headcount detail in this field.
- Enter FTE detail in this field.
- Enter detailed fixed amounts for items such as Location Pay, Also Receives, etc.
- Click to see AU distribution and employee details and modify budget.

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Using the Navigation Path

- The **Navigation Path**, also referred to as **Breadcrumbs**, appears at the top of the screen.
  - Path used to get to where you currently are in the plan view.

- **To create a breadcrumb:**
  1. Open an AU from My Plan -> Open Accounting Unit,
  2. (Note: if AU’s are grayed out, it means that you have not been assigned access to view these AU’s). For the Hospital, please contact Sharad.Kumar@downstate.edu (Hospital). For Academics and Shared Services, please contact Sergio.Maffettone@downstate.edu or William.Washienko@downstate.edu (Academics and Shared Services).
  3. Select or type in an AU to be your starting point and click **OK**.
  4. The name of the AU appears in the navigation path.
  5. In the **My Accounting Units** view, click on each AU level from the top summary to the posting level,
  6. **NOTE:** Please note just click with the mouse to navigate between screens
Review Accounting Units (AU’s)

In the **My Plan View** (see page 16), select **Accounting Units** (AU’s) from the drop-down box.

You will see the AUs that you have been assigned to.

**Note:** You may see AU’s on the screen that are grayed out if you have not been assigned to these AU’s. They appear so you can see where your AU’s roll up in the organization hierarchy.

### View Preloaded Budget and Target Amounts

- Review the preloaded FY 18/19 Projected Budget amounts.
- In **Financial Tab** - View Targets data at Summary Level AU’s for Fund Within Division.
  - Target amounts appear only if you are assigned to all of the AU’s for a fund within a division.
  - Targets appear for Fund/Division for State (3R), Hospital (7H) and Dorm (4R) Funds.
- **Note:** Targets are subject to change.

---

**Finance Plan**

- **My Plan**
- **Financial**
- **Workforce**

![Preloaded Target Dataset](image1.png)

![Preloaded Budget Dataset](image2.png)
• Review the amounts in the preloaded FY19/20-Budget dataset.

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Job/Position</th>
<th>Employee</th>
<th>Pay Rate</th>
<th>2018 19/20-Budget</th>
<th>2018 19/20-Budget</th>
<th>2018 19/20-Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td>Headcount</td>
<td>FTE</td>
<td>Amount</td>
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<tr>
<td>51486</td>
<td>Director</td>
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<td>10.00</td>
<td>1.00</td>
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<td></td>
<td></td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
</tbody>
</table>

Total Budget: 1,451,649
View PS Summary Information

- Click on the **Financial Tab**.
- Select **Accounts** from the **Accounts/Accounting Unit** drop menu field.
- View salary information by expense type (accounts/object code).
- Drill down by clicking on the (►) symbol until lowest detail account is displayed.
salary projection for FY19/20-budget

projection for the FY19/20-budget is based on payroll (PR) 23 (the 3/6/2019 paycheck). see tables below for categories included/excluded in the projection:

<table>
<thead>
<tr>
<th>OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>0100 to 1899</td>
<td>BASE SALARY</td>
</tr>
<tr>
<td>1902</td>
<td>ALSO RECEIVES</td>
</tr>
<tr>
<td>1905</td>
<td>GEOGRAPHIC</td>
</tr>
<tr>
<td>1908</td>
<td>INCONVENIENCE PAY</td>
</tr>
<tr>
<td>1909</td>
<td>INTERN IN RESIDENCE</td>
</tr>
<tr>
<td>1911</td>
<td>LOCATION</td>
</tr>
<tr>
<td>1921</td>
<td>PRE-SHIFT BRIEFING</td>
</tr>
<tr>
<td>1922</td>
<td>SHIFT EVENING</td>
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<td>1925</td>
<td>CONTRACTUAL SALARY INCREASES</td>
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<td>LONGEVITY</td>
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<td>OTHER-GRADUATE STUDENT</td>
</tr>
<tr>
<td>2699</td>
<td>OTHER-STUDENTS FB EX</td>
</tr>
</tbody>
</table>

**employee level salary projection for FY19/20 does not include:**

- Overtime 1948
- Holiday Pay 1947
- Vacation Payoff 1918
- Overtime meals 1985
- Also Receives (Temp Svc) 2052
- Geographic (Temp Svc) 2055
- Location (Temp Svc) 2061
- Supporting Academic** 2100
- Adjunct** 2400
- Teaching Assistants 2483
- Extra Service 2499
- Student Assistants 2600

* 2100 / 2400 are projected with $1 as a placeholder for hourly employees, and should be adjusted as necessary.

These items are budgeted at the AU level in the Financial Tab (see pages 18-20).
Projected Union Salary Increases And Retroactive Payments

Budget Projection Includes:

Bargaining Units that have a contract in place:

Projections for union salary increases and retroactive payments for prior years are included in the Workforce Tab for each individual.

A portion of discretionary raises will be held in reserve until a determination is made regarding the distribution of increases.

Bargaining units that have expired contracts:

Funds will be held in reserve, pending the finalization of the contracts.

PEF Positions (Bargaining Unit 05-Nurses)
1. 2% Raise 4/1/19
2. 2% Raise 4/1/20 (1/4 of FY19/20)

CSEA Positions (Bargaining Unit 02,03,04)
1. 2% Raise 4/1/19
2. 2% Raise 4/1/20 (1/4 of FY19/20)

UUP Positions
1. 2% Raise 7/1/19
2. .5% Discretionary Raise on Base
3. .5% Discretionary Parity on Base
4. Lump Sum Retro

MC Positions
1. 2% Raise
2. 1% Discretionary

PBA/NYSCOPBA Positons
1. 2% 15/16 (4/1/16)
2. 2% 16/17 (4/1/17)
3. 2% 17/18 (4/1/18)
4. 2% 18/19 (4/1/19)
5. 2% 18/19 (4/1/20) (1/4 of FY19/20)
6. Lump Sum Retro 2%/Year Compounded

2% Reserve
.5% Reserve
2% Included in Workforce Tab
.5% Included in Workforce Tab
2% Included in Workforce Tab
.5% Included in Workforce Tab
2% Reserve
1% Reserve
2% Reserve
2% Reserve
2% Reserve
.5% Reserve
.5% Reserve
Review Current Positions in the AU

- Click on the **Workforce Tab**.
- Open **Plan -> Accounting Unit**. Select a posting AU.
  - Scrutinize all positions to determine if salary / distribution is correct.
  - Determine if positions are needed or should be eliminated if possible.
- Select an employee record to work on by clicking on a **Workforce** budget ID.
  - Determine if the position is correctly charged to the AU and required for FY19/20.
  - **If this Position/Line does not belong in this AU**:
    - **Contact**: (Hospital) Milton.Lewis@downstate.edu
    - **Contact**: (Academics & Shared Services) Marty_Deane@downstate.edu, Franci_Scharf@downstate.edu, William.Washienko@downstate.edu or Sergio.Maffettone@downstate.edu
    - **Contact**: (COM & Grad School) Richard.Katz@downstate.edu
    - For budget purposes, change budgeted amounts and FTE/Headcount to zero.
- **Note**: The system has been preloaded with a projected budget for Personal Services, based on **Payroll PR 23 (3/6/2019)**.

![Workforce Budget ID](image)

- **Base Salary/budget amount verification required**
- **FTE Distribution Amounts**

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Job/Position</th>
<th>Employee</th>
<th>Pay Rate</th>
<th>2018 19/20-Budget</th>
<th>2018 19/20-Budget</th>
<th>2018 19/20-Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Headcount</td>
<td>FTE</td>
<td>Amount</td>
</tr>
<tr>
<td>20571H</td>
<td>DSRIP-Admin...</td>
<td>0-MISSING---</td>
<td></td>
<td></td>
<td>8.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>20654H</td>
<td>DSRIP-Exec...</td>
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<td>1.00</td>
<td>1.00</td>
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<td>23449H</td>
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<tr>
<td>26067H</td>
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<td></td>
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<td>26075H H</td>
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<td>-1.00</td>
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<td>1.00</td>
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<tr>
<td>51486H</td>
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<td>1.00</td>
<td></td>
</tr>
</tbody>
</table>
Workforce FTE/Headcount Column

**Note:** The first time you log into LBP, the **FTE/Headcount** column may not appear in your **Workforce** view.

To see the FTE detail column:

- Click on the **Display WF Components button**

- Click on the box to the left of **FTE** and **Headcount** and a check mark will appear

- Click **OK**
Modify Existing Employee Record

- If salary rate is incorrect or not properly distributed to AU’s and salary components:
  - Change number in **FTE/Headcount** field to desired percentage for that AU.
  - Change Unit amounts for non-base salary pay codes, (e.g., Location Pay, Also Receives, etc.).
  - Change end date of position (i.e.; retirement or resignation) using the **Modify Workforce Budget** screen.

- **To modify an employee record.**
  - If a position is no longer needed, change the Pay Rate, FTE, Headcount and Unit amounts for that employee to zero. Very Important - Do not delete the position. Make sure all salary components are zeroed-out, (e.g., Location Pay, Also Receives, etc.).

- **Note:** If required pay code is missing for position, for the Hospital, contact Milton Lewis@downstate.edu; for Academics-COM and Grad School, contact Richard.Katz@downstate.edu and for all other Academics and Shared Services, contact either Sergio Maffettone@downstate.edu or William.Washienko@downstate.edu.

Click to open Workforce budget screen

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Job/Position</th>
<th>Employee</th>
<th>Pay Rate</th>
<th>19/20-Budget</th>
<th>19/20-Budget</th>
<th>19/20-Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>20571H</td>
<td>DSRIP-Administrative</td>
<td>0-MISSING---</td>
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<td>8.00</td>
<td>8.00</td>
<td></td>
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<tr>
<td></td>
<td>Base/Shift Pay</td>
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<td></td>
<td>1.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>0400</td>
<td>INSTRUCTIONAL NR</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>0600</td>
<td>PROFESSIONAL-OTHER NR</td>
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<td></td>
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<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
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<td>Other Pay</td>
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<td>0.00</td>
<td></td>
</tr>
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<td>20654H</td>
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<td>0-MISSING---</td>
<td></td>
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<td>1.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Base/Shift Pay</td>
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<tr>
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<tr>
<td>0600</td>
<td>PROFESSIONAL-OTHER NR</td>
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<tr>
<td></td>
<td>Other Pay</td>
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<td>0.00</td>
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</tr>
<tr>
<td>1902</td>
<td>ALSO RECEIVES RU</td>
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<tr>
<td>1905</td>
<td>GEOGRAPHIC RU</td>
<td></td>
<td></td>
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<td>1911</td>
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<td></td>
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<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

FTE Fields for base salary pay codes

Unit amounts for non-base salary pay codes
To Designate Employee Salary Distribution to Different AU / Add a Missing, Vacant or New, Approved Funded Position

• From the Financial Tab, select the posting AU to work on.
• Select the Workforce tab and click on the Add Budget Icon. The Add Workforce Budget input screen will appear.
• Enter data into Add Workforce Budget fields
• Click OK

Add Workforce Budget fields (A red asterisk = required field):
• ID - Same as the UHB Line number.
  (for a new line number use the format: “NEW-sequence # - Posting AU”.
  Example: “NEW#H321370”)
• Description - Position title. If existing position, can put in employee name.
• Job/Position Code - Click the Find button. Select Position Code. If existing position, same as line number. For additions, select from “Generic codes”.
• Comment: This is a freeform text field (1) If employee is allocated between multiple AU’s, enter the % breakdown by AU for that employee. (2) If modifying an employee record, indicate what was changed, example “changed FTE from .5 to zero”
• Start Date - Expected start date.
• End Date – Leave blank or enter an expected end date.
• Pay Rate – Total annual base salary.
  (Note: For part time employees use actual salary paid, not annualized rate)
Vacant or New Approved, Funded Position Requests

With a few exceptions, a separate, new process will be used in lieu of entering any Vacant or New Positions (funded or unfunded) into LBP. Any of these positions will need to be approved prior to the data being entered into LBP. The entering of this data into LBP will be completed by the Budget Office. At this time, the exceptions are positions in Accounting Units (AU’s) related to COM and Grad School, Nursing, Residents and Physicians.

As a part of this new process, we are requiring that only pre-approved, Vacant and New Positions be added to the budget. To do that, under separate cover, each Department Head or Department AVP and their managers will receive from the Budget Office, a template. The department will complete the template, obtain approval from their Department Head or Department AVP, before submitting the template to the Budget Office at BudgetHelp@downstate.edu. The Vacant and New Positions requested will be reviewed and finalized by Senior Administration and if approved, entered into LBP by the Budget Office.

Only those Vacant Positions that have been approved and posted during the current fiscal year FY18-19, as of May 15, 2019, should be added to the template accompanied with a copy of the posting. Adding of any New Positions need to be supported with the submission of a Business Plan or a detailed justification of why the position is necessary.

IMPORTANT: An agreement to add a Vacant or New, Approved Funded position to the Workforce tab is an interim step in preparing the budget, and does not guarantee that the position will be included in the final budget for FY19-20.

For those AU’s that are exempt from this process, the following should be adhered to when adding positions:

- Use generic position codes to represent the type of position you might need to add to an accounting unit.

  Generic Position Types:
  - PS Regular:
    - 0-MISSING Existing missing from list
    - 0-NEW-FUNDED New position within budget
    - 0-VACANT Vacant approved funded
  - PS Temp Employees:
    - 0-MISSING-TEMP Temp - Existing missing from list
    - 0-NEW-FUNDED-TEMP Temp - New position within budget
    - 0-VACANT-TEMP Temp - Vacant approved funded

All users can add existing positions that are missing from the Accounting Unit.
To View OTPS (Other than Personal Service) Summary Information
– Click Financial Tab.
– In the Financial view, click on a summary account to review.
– Summary Account “OTPS – Totals” is the total of all OTPS accounts.
– Drill down to see details.

Entering a Budget (OTPS and PS non-workforce, lump-sum adjustments, such as overtime, standby, etc.)
– After selecting your posting AU, the screen will show Accounts in the Financial Tab view. Budgets may only be entered at the posting AU level.
– Edit or add amounts to FY19/20 Budget. Input desired dollar amounts in the fields highlighted in yellow.
– PS non-workforce, lump-sum adjustments can be made by changing the amount in the yellow box, or at the detail lines level, but adjustments made in the Financial Tab will not show up in the Workforce Tab.
• Enter OTPS budget in detail as much as possible to help you keep track of your requirement.
• Any object code with a budgeted expense of $10,000 or more, vendor information or item details need to be included, including contract # where applicable.
• Do not enter Agency expenses into the Workforce Tab or **IT WILL BE REMOVED**.
• Any consulting contract should be posted to Object Code “5813-Consultants”.
• Agency expenses should be entered into the Financial Tab under Contracts using Object Code “5842-Manpower Services”. Use display detail lines to enter FTE’s and Titles.
• Please take special care to correctly enter your OTPS expense in the appropriate category (e.g., Supplies, Contracts, Travel) and in the specific object code (e.g., 3001, 4240, 5003, 5842, 7200) that the expense relates to.
• Do not budget for any equipment item for more than $5,000 as this is an operating budget process. Capital budgeting is being done separately. (Hospital only).
• For any questions about OTPS, contact Sharad.Kumar@downstate.edu for the Hospital. Contact either Sergio.Maffettone@downstate.edu or William.Washienko@downstate.edu for Academics and Shared Services.
Adding and Editing Account Detail Lines

- Detail lines are used to breakdown / describe the amounts entered in a posting account. For example, you should list contracts, suppliers or equipment type.
- For contracts, please review the list provided to you by the Budget Office, enter/modify the information where appropriate and if any contracts are missing, please see the next page for instructions.
- To add and edit detail account line data:
  - Click on a posting account.
  - Click the Icon box and select **Detail Lines**.
  - The **Change Line Items** window will open.
Adding and Editing Account Detail Lines (continued)

- From the **Change Line Items** window: Click the **Add Line** box and type a description in the **Line Name** Field.

**Note:** For contracts missing, please enter the following description format: “Contract#-Contractor/Vendor-Contract Description”.

- Add a line for each budgeted item and click **Apply** to move the item to the left box. (You will not be adding dollar amounts on this screen.)

- Hit OK and you will now see the screen to enter line item amounts. Enter amounts in the yellow fields.

- Hit the **Save** button in the upper right hand corner of the screen to save changes.

**Note:** The Adjustment line will show the difference between the total of the detail lines entered and the amount that appears in the **Financial Tab** view for that posting account.
There are two ways to obtain reports of your budgets from Lawson Budgeting and Planning (LBP):

1. Copying Data to Excel, or

2. Exporting Data to Excel.
1. Copying Data to Excel

The following is a quick and easy way to copy contents of the plan view to Excel for review and to produce a hard copy of the budget.

1. While in the Financial Tab, choose Copy to Excel
2. The contents are copied to the clipboard
3. Click OK
1. Copying Data to Excel (continued)

4. Open a file in Excel and Click OK to paste

5. Format worksheet as desired
2. Exporting Data to Excel

The following is a way to export contents directly into Excel for review and to produce a hard copy of the budget.

1. While in the Financial Tab, choose export to Excel
2. A screen will appear for you to select the perimeters
3. Click Next
4. The screen with your selections will appear.
5. Assign options from list under available.
6. Once you have assigned all attributes click Finish.
7. An Internet Browser will open giving you the option to open.
2. Exporting Data to Excel (continued)

Displayed here is the file containing information selected. You can click on the various tabs at the bottom to drill down into the material.
Lawson vs. State Terminology

Account vs. Accounting Unit (AU)
“Accounting Unit” or “AU” in Lawson = State “Account”.
“Account” in Lawson = State “Object Code”.

- **Summary Accounting Unit (AU)** - Alpha-numeric names representing a **total** of a group of AU’s.
  Examples:
  - VP1 - VP – ADMINISTRATION
  - AA - Affirmative Action
  - 7H-CEO - CEO

  - The AU hierarchy flow is as follows:
    - VP Area -> Division -> Fund within division -> Posting level AU.

  - Fund roll-up AU’s- First 2 positions represents the fund as follows:
    - 0R - General IFR
    - 3R - State Purpose
    - 4R - Dormitory
    - 5R - Hospital IFR
    - 7H - Hospital

- **Posting Accounting Unit (AU)**
  - 6 digit number representing the AU level where budget data can be edited.
  - Lowest level in the AU hierarchy.
  - Examples: “361325” DSRIP “321358 Patient Accounts”

- **Summary Account** - Non-numeric names representing a **total** of a group of accounts.
  Examples:
  - PS - Personal Service
  - CONTSvc - Contractual Services
  - SUP - Supplies

- **Posting Account** - 4 digit number representing the account level where budget data can be edited.
  Examples:
  - 5003-Conference/Training Services
  - 5006-Memberships
The link to Lawson Budgeting and Planning (LBP):
http://lawplbpprod.uhb.downstate.org:9080/lbp9/LBP.jsf
Reminder: LBP will only work with Internet Explorer Version 7 or higher.

To obtain form to complete and get access to LBP:
Contact person for access to LBP for the Hospital:
Sharad.Kumar@downstate.edu
Contact person for access to LBP for Academics and Shared Services:
Sergio.Maffetone@downstate.edu
William.Washienko@downstate.edu

The link to obtain form to complete and get access to Business Intelligence (B.I.):
Contact person for access to B.I.:
Robert.Robinson@downstate.edu
For other budgeting inquiries, please feel free to contact the following:

For the Hospital:
Milton.Lewis@downstate.edu
Sharad.Kumar@downstate.edu
Darrel.MacArthur@downstate.edu (Physicians only)

For Academics and Shared Services:
Marty.Deane@downstate.edu
Franci.Scharf@downstate.edu
Sergio.Maffetone@downstate.edu
William.Washienko@downstate.edu
Robert.Robinson@downstate.edu (B.I. Access only)
Richard.Katz@downstate.edu (COM and Grad School only)

The Budget Help Desk is available by sending inquiries to:
BudgetHelp@downstate.edu
1. IFR accounts are accounts that are used for depositing revenue. Due to its state entity status, SUNY requires “appropriation” authority to disburse collected revenue such as revenue collected by IFR accounts from affiliates, research grants, etc. Spending authority for this revenue is provided on an annual basis by the State Legislature and the Governor in the Enacted Budget. As part of the annual budget making process, the state carefully scrutinizes SUNY’s requested levels of appropriation, and System Administration relies on the veracity of campus information to substantiate requested year-to-year changes. It is therefore necessary to prepare a budget allocation request for spending IFR Revenue.

2. Although an account may have a cash balance, the allocation is also required in order to spend. The cash balance is carried over from year to year, but a new budget request for allocation needs to be entered in LBP annually.

**ALLOCATION & CASH BALANCE = APPROVED SPENDING**
Please input in LBP the FY 19/20 planned expenses for each IFR in as much detail as possible to assist us in understanding the plan for spending in the coming year. In order to establish a budget allocation for an IFR AU, the projected cash balance for next fiscal year needs to be determined.

1. First, the projected net revenue for the balance of the current Fiscal Year 18/19 should be calculated. Take into consideration any additional revenue or expenses that will be incurred for the remaining portion of FY 18/19.

2. Next, the projected revenue for FY 19/20 should be estimated based on known factors such as grants, affiliation contracts or other type revenue streams.

3. **Total projected cash available will become the Target (Maximum Allocation) that can be requested for each IFR.**
Establishing a Budget Allocation for IFR AU’s
(a worksheet is below to assist in calculating the projected cash balance)

Guidelines to assist in determination of required allocation (budget):

1. Determine net available funding for operations for the upcoming fiscal year for the AU

   - Projected Adjusted* Beginning Cash Balance as of 7/1/19 *(includes prior year cash balance less disbursements and encumbrances) $ -
   - Plus: Projected Revenue for FY 19/20 -
   - Less: Projected Fringe Benefit Expense (Fringe benefit rates vary. Please contact Sergio Maffettone at ext.2790, if unsure of the fringe benefit rate that applies) -
   - Less: Maintenance Overhead Expense (if applicable) -
   - Less: Administrative Overhead Expense (if applicable) -
   - Net Available Funding for FY 19/20 $ -

2. Requested allocation should include the following estimated costs (limited to the net funding available)

   - Projected Fiscal Year Personal Service Expense (including all salary adjustments for estimated contractual increases) $ -
   - Projected OTPS Expense $ -

- The actual fiscal condition of the IFR will be determined by the cash balance in the account.
- The ability to spend the cash balance will be determined by and limited to the allocation in the account. If revenue is available to support additional expenses, a request can be made to increase the allocation.
The Hospital has separate AU's for Physicians by their major Specialties based on the College of Medicine structure.

All the FTE’s with Physicians titles have been moved to the new AU’s from their original home AU’s.

Zero out any FTE left in the original home AU’s in error. PLEASE INFORM Milton.Lewis@downstate.edu or Darrel.MacArthur@downstate.edu OF THIS ERROR.

Zero out any also receives or any other salary component left in the original home AU’s in error.

All the physician’s AU are under Darrel MacArthur. He can be reached at Darrel.MacArthur@downstate.edu in case you have any questions.

Below is the list of new AU’s created except the Radiology which was created in FY15-16.

<table>
<thead>
<tr>
<th>AU</th>
<th>AU Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>351353</td>
<td>PHYSICIANS - DERMATOLOGY</td>
</tr>
<tr>
<td>351389</td>
<td>PHYSICIANS - EMERGENCY MEDICINE</td>
</tr>
<tr>
<td>351359</td>
<td>PHYSICIANS - PATHOLOGY</td>
</tr>
<tr>
<td>351362</td>
<td>PHYSICIANS - ANESTHESIOLOGY</td>
</tr>
<tr>
<td>351369</td>
<td>PHYSICIANS - FAMILY PRACTICE</td>
</tr>
<tr>
<td>351399</td>
<td>PHYSICIANS - MEDICINE</td>
</tr>
<tr>
<td>351372</td>
<td>PHYSICIANS - NEUROLOGY</td>
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<tr>
<td>351373</td>
<td>PHYSICIANS - OBS/GYN</td>
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<tr>
<td>351374</td>
<td>PHYSICIANS - OPHTHALMOLOGY</td>
</tr>
<tr>
<td>351379</td>
<td>PHYSICIANS -Pediatrics</td>
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<td>351382</td>
<td>PHYSICIANS - PSYCHIATRY</td>
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<td>PHYSICIANS - RADIOLOGY</td>
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<td>351383</td>
<td>PHYSICIANS - RADIATION THERAPEUTIC</td>
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<td>351384</td>
<td>PHYSICIANS - REHAB MEDICINE AND ORTHOPEDIC</td>
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<td>PHYSICIANS - OTOLARYNGOLOGY</td>
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<tr>
<td>351386</td>
<td>PHYSICIANS - SURGERY</td>
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<tr>
<td>351387</td>
<td>PHYSICIANS - NEUROSURGERY</td>
</tr>
<tr>
<td>351388</td>
<td>PHYSICIANS - UROLOGY</td>
</tr>
</tbody>
</table>
State finance law requires that the Office of State Comptroller report to the Legislature on contracts for consulting services that were issued by State agencies during the fiscal year.

Therefore, we are requesting that any consulting contract be posted to Object Code “5813-Consultants” in the FY19/20-Budget. Below are the types of consulting contracts that need to be reported:

- Analysis
- Research
- Training
- Data Processing
- Computer Programming
- Engineering
- Environmental Health Services
- Mental Health Services
- Accounting
- Auditing
- Paralegal
- Legal
- Similar Services
Union Codes For New Hires And Employee Status Changes

For informational purposes, below are the bargaining units to calculate any PS information

<table>
<thead>
<tr>
<th>Negotiating Unit</th>
<th>Union Long Name</th>
<th>Union Short Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>02,03,04</td>
<td>Civil Service Employee Association, Inc., Local 1000, AFSCME, AFL-CIO</td>
<td>CSEA</td>
</tr>
<tr>
<td>05</td>
<td>Public Employees Federation, AFL-CIO</td>
<td>PEF</td>
</tr>
<tr>
<td>08</td>
<td>United University Professions</td>
<td>UUP</td>
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<tr>
<td>13</td>
<td>Management Confidential</td>
<td>MC</td>
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<tr>
<td></td>
<td>Communications Workers of America/Graduate Student Employees Union,</td>
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<td></td>
<td>Local 1104</td>
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<td>Communications Workers of America/Graduate Student Employees Union,</td>
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<td></td>
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<tr>
<td>21</td>
<td>NYS Correctional Officers and Police Benevolent Association, Inc.</td>
<td>NYSCOPBA</td>
</tr>
<tr>
<td>31</td>
<td>The Police Benevolent Association of New York State, Inc.</td>
<td>PBANYS</td>
</tr>
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</table>
Workforce Planning

Workforce Planning Elements

Workforce planning is a core function of human resource management and it is related to the systematic identification and analysis of what an organization is going to need in terms of the size, type, experience, knowledge, and skills of its workforce to achieve its objectives. It is a process used to generate business intelligence to inform the organization of the current, transition and future impact of the external and internal environment on the organization.

Strategic workforce planning: usually covers a three to five year forecast period, aligned to business needs and outcomes. It focuses on identifying the workforce implications, current, transition and future of business strategic objects and includes scenario planning.

Operational workforce planning: usually covers the next 12-18 months and should align with the timeframe of the business planning cycle. It is the process and systems applied to gathering, analyzing and reporting on workforce planning strategy.
Workforce Planning (continued)

The following is a list of the most common components of a workforce plan:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
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<tbody>
<tr>
<td>Forecasting and assessment</td>
<td>Estimates, for example, of the internal/external supply and demand; labor costs; organizational growth rates; and revenue sources.</td>
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<td>Succession planning</td>
<td>Designating, for example, the progression plan for key positions.</td>
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<td>Leadership development</td>
<td>Designating high-potential employees; coaching; mentoring; rotating people into different projects.</td>
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<tr>
<td>Recruiting</td>
<td>Estimating needs for head count, positions, location, timing, and more.</td>
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<td>Retention</td>
<td>Forecasting turnover rates; identifying who is at risk and how to keep them.</td>
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<td>Redeployment</td>
<td>Deciding who is eligible for redeployment, and from where to where.</td>
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<td>Contingent workforce</td>
<td>Designating the percentage of employees who will be contingent, and in what positions.</td>
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<tr>
<td>Potential retirements</td>
<td>Figuring out who is eligible, when they are eligible, who will replace them, and what alternative work arrangements are available that could prevent a retirement problem.</td>
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<td>Performance feedback</td>
<td>Instituting opportunities to set expectations, assess individual and organizational success, and putting together development plans (both individual and collective).</td>
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<td>Career path</td>
<td>Career counseling for employees to help them move up.</td>
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<td>Backfills</td>
<td>Designating key-position backups.</td>
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<td>Environmental forecast</td>
<td>Forecasts of industry and environmental trends, as well as a competitor assessment.</td>
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<td>Identifying job and competency needs</td>
<td>Doing a skills-and-interest inventory.</td>
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<tr>
<td>Metrics</td>
<td>Identifying metrics to determine the effectiveness of workforce planning.</td>
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</tbody>
</table>
Budget Submission

Completed budgets must be submitted to the Budget Departments by
May 15, 2019
After this date, the budget will be locked to modification.