What is Office of Fiscal Planning and Analysis?

**Mission**
The Office of Fiscal Planning and Analysis (OFPA) supports the strategic mission of the University by preparing, managing, and implementing the University’s annual operating budget for general and auxiliary funds. We assist academic and administrative support units in budget preparation and execution while providing timely and accurate financial information to the Mississippi Institute of Higher Learning (IHL) and the Legislative Budget Office (LBO). We provide forecasting models and other financial analyses that are used to support resource allocation decisions. OFPA strives to deliver excellent customer service, education and guidance on best practices related to budgeting and financial management throughout the University.

**Vision**
The Office of Fiscal Planning and Analysis will be a proactive and integral partner in the implementation of the University's strategic plan by providing timely, accurate and complete analytical services related to financial planning, forecasting and decision support in resource allocation and development.

Who do I contact if I have questions?

Go to [https://www.usm.edu/fiscal-planning-analysis/](https://www.usm.edu/fiscal-planning-analysis/) for up-to-date contact information. Contact OFPA with questions at [budgets@usm.edu](mailto:budgets@usm.edu).
Logging into SOARHR

1. Go to soarhr.usm.edu in your web browser.
2. Type in User ID. It will be your emplid with the “W”.
3. Type in your Password.
4. Click Sign In.

Instructions for Budget Development - *Save your changes as you go*

1. Go to Nav Bar (Compass Icon) > Navigator > USM Budget Menu > Use > Budget Entry
2. Enter Fund Code, USM Financials Department, and Program Code.
3. Enter the appropriate budget period.
4. Click Search to open the budget development page.
5. Open the View/Update Salary Information link to view salaries and make any changes.

6. If applicable, enter the appropriate amount in the increase/decrease column for each position. A comment is required for any changes made. These comments will be used by OFPA.

7. Any salary or wage changes will appear on the main page under the increase/decrease column. Fringe will be adjusted based on the salary and wage changes.

8. Changes for operating accounts can be made on the main budget development page. A comment is required for each account change.
9. Attachments can be added to the budget development page. The attachments will be available for viewing by budget authorities (during routing) and OFPA. Multiple attachments may be uploaded.

![Add Attachment](image)

**Upload Attachments**

*Message*

File names cannot exceed 40 characters.

![File Box](image)

**File Box**

<table>
<thead>
<tr>
<th>File Name</th>
<th>View Attachment</th>
<th>Upload File</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>View Attachment</td>
<td>Upload File</td>
</tr>
</tbody>
</table>

**OK**  **Cancel**

10. The “Create New Position” section should only be used under one of the following circumstances:

   a. A new position is being added to the budget (new funds) and has been previously approved by your respective Vice President.

   b. You are moving funds from an existing position into a newly created position that isn’t listed on your current Salary/Wage report.

If one of these applies, please click the ‘Create New Position’ button, and follow the instructions for the required information.

![Create New Position](image)
You will need to provide Position Title, FTE, No. of Months, Salary, and Funding Source(s) in the comment box for OFPA. Once you have this information entered, click OK to save.

This section should only be used under one of the following circumstances:

1. A new position is being added to the budget (new funds) and has been previously approved by your respective Vice President.

2. You are moving funds from an existing position into a newly created position that isn't listed on your current Salary/Wage report.

*In both situations above, a new job description may be needed. Contact your HR Partner to ask this question.

Please provide the following information:

Position Title, FTE, No. of Months, Salary, and Funding Source(s)
11. To add a new operating account, click the plus sign next to one of the existing accounts:

Enter the new account needed, budget amount, and a comment explaining the new account needed.

After you have entered the required information, the row should look like the following example:
12. If you would like to download or print an excel spreadsheet of the budget information for your records, click the ‘download budget accounts to excel’ button (circled below). An excel will download to your computer.

The information from the budget entry page will download to excel for your records. See below.

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Current Budget</th>
<th>Incr/Decr</th>
<th>New FY Budget</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARY</td>
<td>Salaries</td>
<td>$150,000.00</td>
<td></td>
<td>$150,000.00</td>
<td></td>
</tr>
<tr>
<td>WAGES</td>
<td>Wages</td>
<td>$10,000.00</td>
<td></td>
<td>$10,000.00</td>
<td></td>
</tr>
<tr>
<td>FRINGE</td>
<td>Fringe Benefits</td>
<td>$50,000.00</td>
<td>$12,950.00</td>
<td>$62,950.00</td>
<td></td>
</tr>
<tr>
<td>CONTSV</td>
<td>Contractual Services</td>
<td>$10,000.00</td>
<td></td>
<td>$10,000.00</td>
<td></td>
</tr>
<tr>
<td>COMMODO</td>
<td>Commodities</td>
<td>$20,000.00</td>
<td></td>
<td>$20,000.00</td>
<td></td>
</tr>
<tr>
<td>EQUIP</td>
<td>Equipment</td>
<td>$10,000.00</td>
<td></td>
<td>$10,000.00</td>
<td></td>
</tr>
</tbody>
</table>

An excel may also be downloaded for the View/Update Salary Information page by clicking the download excel button.
Instructions for Sending Budget Form to Workflow

1. Once all changes have been made to the budget form, you will need to send to workflow for budget authority and OFPA approval.
2. Click the ‘Send to Workflow’ button on the main budget form page.

![Send to Workflow button](image)

3. Once the budget form has entered workflow, changes cannot be made unless the form is denied back to the requestor. After clicking ‘send to workflow’, the fields will be grayed out as shown below.

![Budget form in workflow](image)

4. You will be able to view the workflow routing map by clicking ‘Return to Search’ and opening the budget entry page again. You may click on ‘Multiple Approvers’ to see where the form routed.

![Workflow routing map](image)

5. Workflow emails will be generated at each level of approval to notify the budget authorities that the form has entered their worklist. Only one budget authority is required to approve the form at each level.
   Should a budget authority deny the form, the budget developer will receive a denial email. The budget developer will be required to work the budget form again and send through workflow.
Instructions for Approving or Denying Budget Forms in Workflow

Budget approvers will receive a workflow email notification for each budget form that has routed to their worklist. If there are multiple approvers on one level, only one approver needs to approve/deny the form for it to route to the next step.

1. To view the forms pending your approval, login to SoarHR.
2. Click Navigator – Worklist – Worklist to view your pending worklist items.
3. Pending budget forms will appear with a USM_BUD_DEV link.

4. Approvers will be able to view changes to the operating accounts and the salary information. To view the salary information, click on ‘View/Update Salary information’.

5. The salary information page will open and allow the approver to view all changes made and comments.

6. Changes to the operating accounts will appear on the main budget form page.
7. Budget approvers will be able to view attachments and new position requests before approving or denying the form. In the top right corner of the form, links will appear only if this information has been added by the budget developer. Click on the link(s) to view:

- View position request(s)
- View Attachment(s)

8. After reviewing all form changes and any attachments/requests, the budget approver will either approve or deny the form.

- [Approve]
- [Deny]

6. **To approve** – click the approve button on the budget form page. This will route the form to the next level of approval. You will be able to view the updated workflow routing map by clicking ‘Return to Search’ and opening the budget entry page again. At this point you should see your approval marked green.
7. **To deny** – click the deny button on the budget form page. This will route the form back to the budget developer(s). You will need to enter a comment for the denial to explain what modifications are needed on the form. This comment will be visible for the budget developer to view and correct the form.

You will be able to view the updated workflow routing map by clicking ‘Return to Search’ and opening the budget entry page again. At this point you should see your box marked red and denied.

The budget developer will receive a denial email and is required to open the budget form for corrections and send back to workflow.