



# Budget Broadcast

with the  
University Budget Office

February 8, 2024

# Agenda

- Budget Calendar
- Texas University Fund (TUF)
- Cognos Reports to Power BI Update
- IDT Budget Check Functionality
- Non-Resident Tuition Rate
- New Budget Office Website
- Announcements and Reminders



# Budget Calendar

## University of North Texas Fiscal Year 2025 Budget Preparation Calendar



FY25 Planning	Responsible Party	Action
February 2, 2024	Campus Users	Deadline for Permanent ABA's to be approved and in Budget Office queue. (These transactions will be the ones to affect the FY25 seed budget in Axiom).
February 5-9, 2024	University Budget Office	UBO processes permanent ABA's
February 15, 2024	University Budget Office	Flat revenue estimates for tuition (central and differential) and fees (instructional and mandatory) to be used
February 12-15, 2024	University Budget Office/ System Admin	Loading of all permanent budgets from PeopleSoft over to Axiom. Loading of HRPD info for Labor Planning. UBO validates information.
February 12-15, 2024	University Budget Office	UBO pre-loads existing transfers budgets one for one basis.
February 19, 2024	Campus Users/ University Budget Office	UBO to provide Campus Users with guidelines/ deadlines.
February 19, 2024	Campus Users	Axiom opens for Campus Access. Individual departments receive instructions and guidelines from University Budget Office.
February 19 - March 29, 2024	Campus Users/ University Budget Office	Train campus on Axiom Budgeting. Offer 2-4 sessions per week (concentrate on beginning of period). Run formal trainings concurrently, with UBO staff available as needed for specialized assistance and one-on-one questions.
TBD	President/ Cabinet	<b>BUDGET HEARINGS: Axiom expense and HEF, LSF</b> - President's Cabinet
April 12, 2024	Campus Users	Axiom closes for Campus users
April 15 - May 31, 2024	University Budget Office	UBO balancing of funds and transfers, finalize revenue assumptions, validate campus inputs, prepare of narratives and slides.
June 3-21, 2024	University Budget Office	Report finalization, quarterly allocations.
TBD (June 26, 2024)	University Budget Office/ System Admin	System close of Axiom. UNT System's Budget Office prepares analysis and compiles component unit budgets into the UNTS Consolidated FY25 Budget and prepares budget presentations.
TBD (July, week 1)	University Budget Office	Narrative due to System
TBD (August, week 1)	System Admin	UNT System's office posts FY25 budget in advance of the Board of Regents meeting.
August 15-16, 2024		UNT System Board of Regents Budget Review Meeting



# Texas University Fund (TUF)



# Cognos Reports Update

Luis Angulo

Sr. Director Financial Planning

# Cognos Reports to Power BI Update

Launching our top 40 reports, simultaneously utilizing both Power BI and Cognos platforms. This parallel execution ensure efficient and comprehensive reporting across our systems



# IDT Budget Checking Functionality

Paul Smith

Sr. Principal Accountant

# IDT Budget Check Functionality

- Budget check functionality added to IDT form to minimize complications at the end of the process
- The new process mirrors the ABA budget checking procedure
- Two status indicators at the bottom of the IDT now

Charge PC BU

Charge Project ID

Charge Activity

Pay PC BU

Pay Project ID

Pay Activity

**Attachments** Personalize | Find | | | First 1 of 1 Last

Attachment Number	Attached File	Existing Comments	Add Comments	Add Attachment	
			<input type="text"/>	Add Attachment	+

Save and Validate

Save & Preview Approvals

Notifv Refresh

**CF Valid Status** Valid

Submit for Approval

**Budget Valid Status** Valid

Recycle Delete

[Requester Training Guide](#)

- CF Valid Status- check chartfields (source & destination) against Actuals **AND** Budget to confirm validity
- Budget Valid Status- checks IDT amount against available budget for the chartfield requested

# IDT Budget Check Functionality

- New budget error section insert into the Errors tab

← ABA/ID/CT Entry
IDT Entry

IDT Entry

Errors

### IDT Form

Business Unit	NT752	IDT ID	0000016302	Last Updated By	Smith, Paul Wayne (pws0032)	<a href="#">Print Form</a>
Prepared By	Smith, Paul Wayne (pws0032)	Status	Open	Last Updated On	01/31/2024 1:32:59PM	
*Contact No:	<input type="text" value="940/369-5545"/>	IDT Total	\$5.00			
Prepared On	01/31/2024	*IDT HDR Description	<input type="text" value="TEST"/>			

[View Rules](#)

Line Number	Line Description	Amount	Charge side Budget Status	Charge side Budget Status	Line Validation Status	Validation Error Message

Personalize | Find | View All | | 
First ◀ 1 of 1 ▶ Last

# IDT Budget Check Functionality

- CF Valid Status= Error

CF Valid Status **Error**
Budget Valid Status **Error**

- Error presented if the chart string elements don't work as a combination on Actuals ledger (same as before):

< ABA/ID/CT Entry
IDT Entry

IDT Entry Errors

### IDT Form

Business Unit	NT752	IDT ID	0000016302	Last Updated By	Smith,Paul Wayne (pws0032)	<input type="button" value="Print Form"/>
Prepared By	Smith,Paul Wayne (pws0032)	Status	Open	Last Updated On	01/31/2024 1:27:07PM	
*Contact No:	<input type="text" value="940/369-5545"/>	IDT Total	\$5.00			
Prepared On	01/31/2024	*IDT HDR Description	<input type="text" value="TEST"/>			

[View Rules](#)

IDT Errors							Personalize   Find   View All   <input type="button" value="Print"/>   First 1 of 1 Last
Line Number	Line Description	Amount	Charge side Budget Status	Charge side Budget Status	Line Validation Status	Validation Error Message	
1	16302-Test	5.00	Valid		<b>Error</b>	Invalid Fund category and Fund combination on Pay To ChartString	

# IDT Budget Check Functionality

- CF Valid Status= Error

CF Valid Status **Error**
Budget Valid Status **Error**

- Error presented if the chart string elements are not aligning with budget ledger (no valid budget exists for that chart string):

< ABA/ID/CT Entry
IDT Entry

IDT Entry
Errors

### IDT Form

Business Unit	NT752	IDT ID	0000016302	Last Updated By	Smith, Paul Wayne (pws0032)	<input type="button" value="Print Form"/>
Prepared By	Smith, Paul Wayne (pws0032)	Status	Open	Last Updated On	01/31/2024 1:28:56PM	
*Contact No:	<input type="text" value="940/369-5545"/>	IDT Total	\$5.00			
Prepared On	01/31/2024	*IDT HDR Description	<input type="text" value="TEST"/>			

[View Rules](#)

IDT Errors							Personalize   Find   View All   First 1 of 1 Last
Line Number	Line Description	Amount	Charge side Budget Status	Charge side Budget Status	Line Validation Status	Validation Error Message	
1	16302-Test	5.00	Error		Error	Charge line Chartstring for line 1 is not a valid budget string.	

# IDT Budget Check Functionality

- Budget Valid Status= Error

CF Valid Status Valid      Budget Valid Status Error

Submit for Approval      Recycle      Delete

- Error presented if the chart string is valid, but the available budget does not cover the amount being processed on the IDT

Find | View All    First 1 of 1 Last

0    GL Jnl ID    Jnl Dt    Jnl Ln    + -

Line Status    Open    **Transfer Amount for line 1 exceeds budget balance of \$99.61.**

Offer Office Comments

Personalize | Find | View All | First 1 of 1 Last

IDT Entry    Errors

**IDT Form**

Business Unit	NT752	IDT ID	0000016253	Last Updated By	Smith, Paul Wayne (pws0032)
Prepared By	Smith, Paul Wayne (pws0032)	Status	Open	Last Updated On	01/26/2024 3:59
*Contact No:	940/369-5545	IDT Total	\$505.00		
Prepared On	01/26/2024	*IDT HDR Description	TEST		

[View Rules](#)

**IDT Errors**

Line Number	Line Description	Amount	Charge side Budget Status	Charge side Budget Status
1	16253-Test	505.00	Warning	<b>Transfer Amount for line 1 exceeds budget balance of \$99.61.</b>

# Non-Resident Tuition Rate

Chris Foster

AVP, Student Accounting

# Statutory Tuition

- **Types of Tuition**
  - Statutory - Prescribed by Texas Education Code - consistent rate across all public institutions.
  - Designated - Tuition authorized by the governing board for an institution. Created as part of tuition deregulation in early 2000's.
  - Differential - Additional tuition required to support specific degree programs.
- **Statutory Tuition Rates**
  - Texas Residents: \$50.00 per SCH
  - Oklahoma Residents: \$100.00 per SCH (UGRD only)
  - Non-Residents: \$470.00 per SCH

# Recent Litigation & Impact to Non-Resident Tuition

- From Summer 2022 through Fall 2023, UNT was involved in litigation related to the assessment of the non-resident tuition rate.
- During the litigation, UNT was prohibited from charging the Non-Resident Tuition Rate (\$470/hr) to non-Texas residents who were U.S. citizens or permanent residents.
- During this period, Student Accounting added a “Statutory Tuition Adjustment” to each of the student accounts. The Statutory Tuition Adjustment discounted the non-resident tuition charge (\$470/hr) down to the rate that a Texas resident would pay (\$50/hr).
- If a student qualified for another type of in-state waiver program (ex: Competitive Scholarship, TA/RA Employment, etc.) they continued to receive that in-state waiver.

# Recent Litigation & Impact to Non-Resident Tuition

- The Statutory Tuition Adjustment did not apply to international students.
- The litigation was resolved during the Fall 2023 semester - UNT continued to provide the Statutory Tuition Adjustment for students in Fall 2023 to ensure students and families (U.S. citizens, PR, non-Texas residents) would have time to plan for normal tuition rates beginning with Spring 2024.
  - *Note: this was not an “increase” to tuition and fees.*
- From Summer 2022 through Fall 2023, the loss of Non-Resident Tuition Revenue for U.S. citizens and permanent residents exceeded **\$10.8M**.
  - An average of 600 students per term received the adjustment.
  - In total, 1,449 students were impacted (unduplicated).

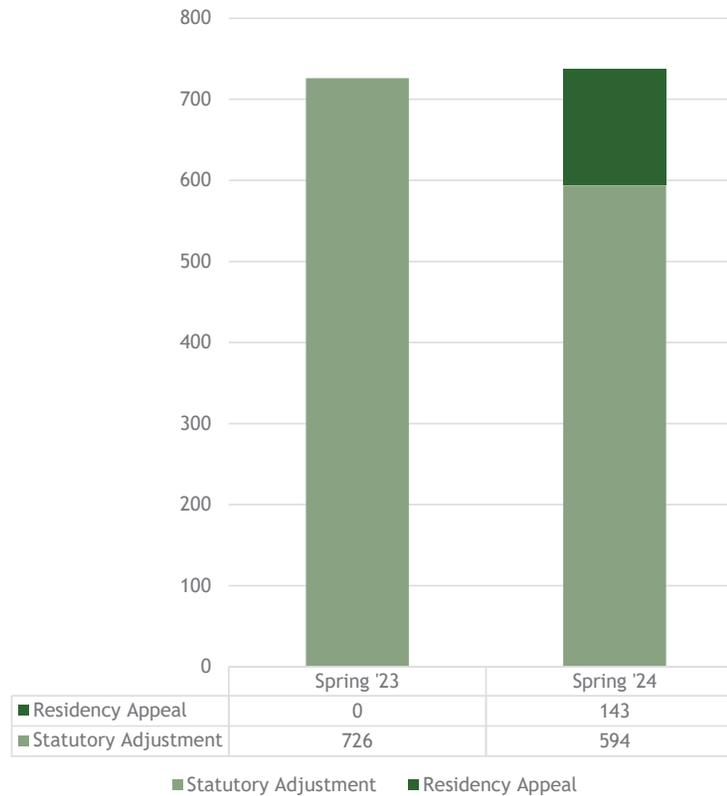
# Spring 2024

- All students who did not have Texas residency or qualified for an in-state tuition waiver were charged the Non-Resident Tuition rate beginning with Spring 2024. Student Accounting communicated with each student regarding the “return” to the normal rate assessment process.
- Had the litigation continued into Spring 2024, UNT would have lost approximately \$3.2M in Non-Resident Tuition dollars at an average of \$4,400 per student.
- In total, 737 U.S. citizens/permanent residents enrolled in Spring 2024 and did not qualify for a formal in-state tuition waiver (Competitive Scholarship, TA/RA Employment, etc.).
  - 143 students were able to prove Texas Residency through the official Residency Appeal process.

# Spring 2024: Analysis

- ▶ UNT will continue to assess the Non-Resident Tuition Rate to all non-Texas residents in compliance with Texas Education Code.

Spring '23 / Spring '24 Comparison



# • New Budget Office Website

Margarita Venegas  
Director of Communication

# Navigating the new Budget website

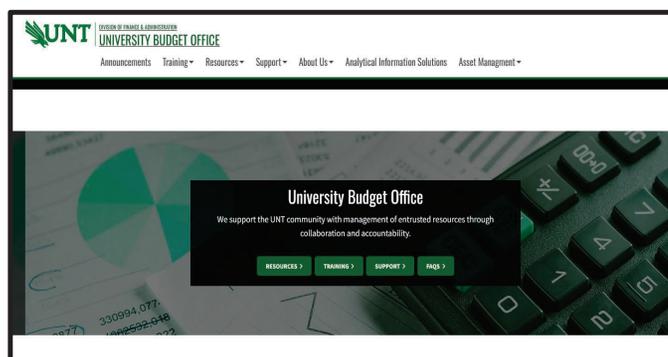
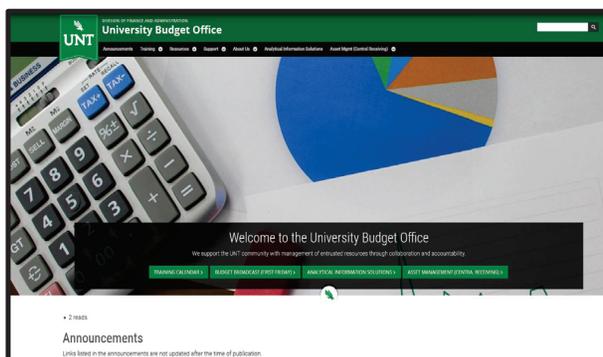
## What's changed?

- Homepage- the look & links
- Training- menu & Budget Broadcast
- Resources- combined for easier navigation
- Support- access links all on one page

Now, let's see what it looks like...

# Navigating the new budget website

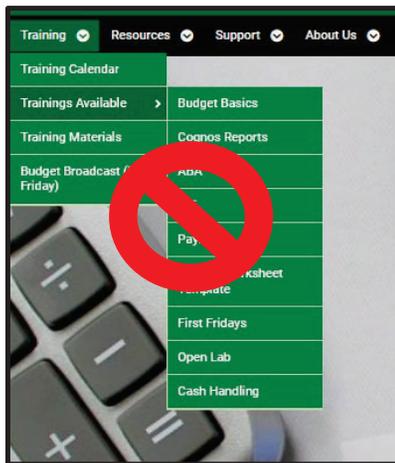
## Home page



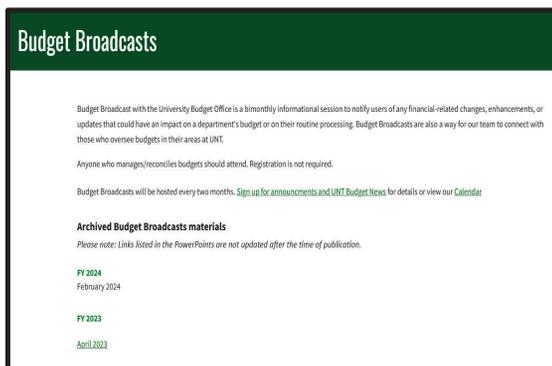
- Quick links to most-used pages: resources, training, support & FAQs
- No announcements out front; links to pages

# Navigating the new Budget website

## Training



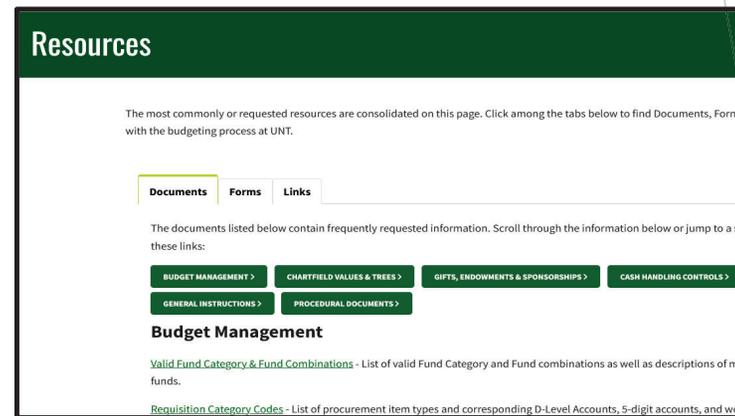
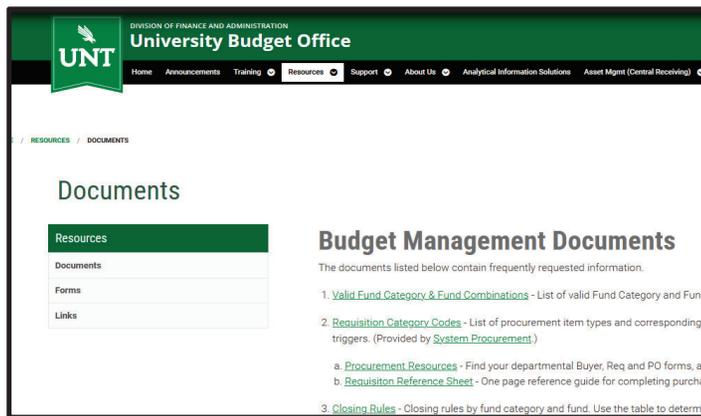
- No menu drop down for each training. Each training description can still be found on “Training Available” page



- Budget Broadcasts description & archive on one page. No more “First Fridays” mentions. Last two FY info to prevent confusion

# Navigating the new Budget website

## Resources



- Documents, forms & links on one page with quick menu to take you where you want to go

# Navigating the new Budget website

## Support

**Access Requests (Denton users)**

HSC, UNT Dallas, and UNT System users may request access by visiting the [UNT System Finance Reporting page](#).

**Cognos Access (Denton Users only)**

- Complete the [Cognos Access eForm for Denton Users](#)
- Or email [Budget.Office@unt.edu](mailto:Budget.Office@unt.edu) with your EUID (xxx0000) and supervisor cc'd

**ABA Access (Approver or Entry) - After completing ABA Training**

- Email [Budget.Office@unt.edu](mailto:Budget.Office@unt.edu) with your EUID (xxx0000)

**Other Access Requests**

**Add Me to the Budget News Email**

Support

If you would like to receive information regarding updates, current budget trainings, and news from the Budget Office, please contact us at [Budget.Office@unt.edu](mailto:Budget.Office@unt.edu).

Budget User Group

Add Me to the Budget News

First Name \*

Last Name \*

Email \*

Title \*

Submit

[Report a Broken Link](#)



**Support & Access**

The Budget Office oversees the UNT budget while supporting those who maintain the budgets of other areas on campus. We offer a variety of tools to assist with those goals.

**Add me to the Budget News Email List**

If you would like to receive information regarding updates, current budget trainings, and news from the Budget Office, please contact us at [Budget.Office@unt.edu](mailto:Budget.Office@unt.edu).

UNT faculty and staff at our Denton and Frisco campuses may need access to the following tools. Please see below for more information. UNT System users may request access by visiting the [UNT System Finance Reporting page](#).

**Access steps for Denton/Frisco users**

**Cognos Access**

- Complete the [Cognos Access eForm for Denton Users](#)
- Or email [Budget.Office@unt.edu](mailto:Budget.Office@unt.edu) with your EUID (xxx0000) and please copy in your supervisor. We will need sup

- Contact us for Budget News email or access request (Cognos, ABA, etc.) in one location



# Announcements & Reminders

We want to welcome the  
newest additions to the  
Budget Office:

Jaime Abu-Shair: Financial  
and Asset Coordinator

and

New Budget Baby....yes,  
Payton had her baby girl!



# Announcements and Reminders

## Upcoming Training

### ➤ Payroll

- March 19<sup>th</sup> 10-11am
- April 18<sup>th</sup> 2-3pm
- May 21<sup>st</sup> 10-11am
- June 20<sup>th</sup> 2-3pm

Register at:

<https://unt.bridgeapp.com/learner/training/d8c9083e/enroll>

### ➤ Cognos Reporting

- March 12<sup>th</sup> 2-3pm
- April 11<sup>th</sup> 10-11am
- May 14<sup>th</sup> 2-3pm
- June 13<sup>th</sup> 10-11am

Register at:

<https://unt.bridgeapp.com/learner/training/cc7b1724/enroll>

# Upcoming Budget Broadcast 2024

- February 8<sup>th</sup> 2-3pm Life Sci Bldg. A204
  - April 11<sup>th</sup> 2-3pm Life Sci Bldg. A204
  - June 13<sup>th</sup> 2-3pm
  - August 8<sup>th</sup> 2-3pm
  - October 10<sup>th</sup> 2-3pm
  - December 19<sup>th</sup> 2-3pm
- **Connecting with us.....**
  - **Budget Office:  
940.565.3233**
  - **[Budget.Office@unt.edu](mailto:Budget.Office@unt.edu)**

Questions?