Knowledge Services Logo

FY2026 BUDGET PROCESS COMMUNICATION

TIMELINE
- EPM opened for the annual budget process on April 16.
- Department users can make entries in EPM until May 30.

UNIT RESPONSIBILITY
- Units are responsible for ensuring submitted data is accurate.
- Estimated revenues/expenses and positions/salaries should be reviewed thoroughly prior to the campus EPM deadline.

BUDGETS, PLANNING, AND ANALYSIS REVIEW
- The review by Budgets, Planning, and Analysis (BP&A) is limited in scope. The focus will be on balanced budgets only.
- If changes are required after EPM closes to the campus, the Dean's Office/College Business Officers (CBOs) or the Vice President's Office/Division Business Administrators (DBAs) will be notified by the BP&A budget resource for the assigned unit.

ALLOCATION OF FUNDING
- The Dean's Office/College Business Officers (CBOs) or the Vice President's Office/Division Business Administrators (DBAs) will allocate E&G, Designated Tuition, and Mandatory Fees funding to departments/cost centers in EPM.
- The Dean's Office/College Business Officers (CBOs) or the Vice President's Office/Division Business Administrators (DBAs) are responsible for communicating directly with departments about any changes to previously allocated amounts.
- Security access for the allocation forms was granted in March.

EPM TRAINING

EPM training is mandatory for all users to obtain write access for department budget editing during the annual budget process.

- Check the class schedule on the [Knowledge Services Training website](#) if you need to take the training.

EPM LABS

- Schedule your lab session on Teams with your assigned BP&A budget resource between April 16 – May 30.
- Sessions are available to answer specific questions related to a Unit's review of revenues, expenses, and positions/salaries.

BUDGETING ALL COST CENTERS

- Active cost centers that receive consistent revenue should be budgeted in EPM.
- Exclusions to budgeting:
  - Agency cost centers that begin with a nine will remain set up on associated revenue and not be budgeted in EPM.
  - Grants/Projects and Cost Shares will not be budgeted in EPM.
  - Cost centers that do not generate revenue or only use carry-forward funds to pay expenses should not be budgeted in EPM.

BUDGETING ALL POSITIONS

- All full-time, permanent part-time, and benefits eligible positions should be budgeted in EPM.
- Non-benefits eligible positions are budgeted using lump sum amounts plus added fringe in EPM.

POSITION DATA PULL

- Position data was pulled from UT Share on April 2.
- Changes not received by BP&A prior to April 1 will not be reflected in EPM.

BUDGETING TIPS

- Budgets must net to zero in EPM. Revenue minus expenses equals zero.
- Position adjustments including salaries, promotions, awards, etc., are the responsibility of each Unit.
- All fringe amounts are included in the total funding allocated to each Unit.
- Reserves must be budgeted on salary reserve lines. Account B9000 should not be used by units.
- Revenue should not be entered on R level accounts.

RECONCILIATION OF CHANGES (ROC) WORKSHEET

- Each Unit is responsible for communicating their preferred reconciliation process to departments.
- ROC Worksheets (Academics & Other) are on the BP&A website.

If you have any questions or concerns, contact Knowledge Services at [817-272-2155](#), [knowledgeservices@uta.edu](#), [chat](#) or open a [Service Now Ticket](#).