

# Hyperion Meeting – FY2022 Budget Development Agenda

Three Meeting Options: Wednesday 04-14-2021, Thursday 04-15-2021 or Friday 04-16-2021

Leading the Meeting Budget and Financial Planning: Tammy Anthony, Elizabeth Bay, Paula Pierson and Jason Welch  
Attendees Invited to the Meeting: Hyperion Users with View Access

1. Where are we in the Budget Development Process for the FY2022 UT System Budget?

|  |   |
|--|---|
| <b>Revenue Forecasts:</b> Net Sales and Services, Non-Mandatory Fees, Mandatory Fees, Differential Tuition, Option 3/On-line Revenue and Other Revenue | ✓ |
| <b>Revenue Transfers</b>   | ✓ |
| <b>Positions Budgets</b>   | ✓ |
| <b>Permanent Budget Transfers for E&amp;G/Designated Tuition</b> submitted through April 9   | ✓ |
| <b>Cost Center Reviews and Balancing in Hyperion – Mon April 19 thru Fri May 14</b>  |   |

2. Cost Center Reviews and Balancing in Hyperion

**Goal:** Each Costs Center should show a zero-bottom line which in Hyperion is the row labeled “Net Transfers In and Rev Less Expenditures”

**What does this mean?**

Revenues (Incl Revenue Transfers In) = Expenses (incl Expense Transfers)

**How do I do this?**

**Option 1:** Sign into Hyperion with your login once you receive your email. Call up each of your cost centers one by one to review the details and submit Hyperion Change Request (HCR) forms as needed to balance the cost centers.

**Option 2:** Using the excel report and updates you get you will submit HCR forms as needed to balance the cost centers. You will receive an excel report two times a week until the last 5 days at which time you will receive daily if there are cost centers remaining out of balance.

3. Let’s Review the Guide together...

a. Types of Cost Center Adjustments to consider in order to balance (Page 3)

- i. Non-Position Expense Adjustments
- ii. Revenue Transfer Adjustments
- iii. Position Funding Adjustments
- iv. Revenue Projections Adjustments

Note: Adjustments to any of these can have other impacts that may need to be considered carefully so make sure you choose the best one for the situation. Changes above could create an out of balance on cost centers you previously balanced.

b. Other Things to consider

- i. Additional Pay (aka Supplemental Pay) and Longevity Pay  
Is there a need to budget for these expenses in specific cost center?
- ii. Reallocation of expenses based on new year revenue projections
- iii. Hyperion Change Form (HCR) - Examples

- c. Hyperion “Read/View Only”
  - i. Firefox is preferred browser
  - ii. Using “Tools” Please change your password after you log in the first time
  - iii. Using “Navigation” and **UTSABdgt**
  - iv. Set your User Preferences for **Display Options**
  - v. Set your User Preferences for **User Variable Options**
  - vi. “My Task List” is where you will spend your time

4. Next Steps – what to expect...

**Monday April 19** – You will receive an email from Jason Welch

- Hyperion User Access Information
- Email Jason with Access issues if you run into them at any point [jason.welch@utsa.edu](mailto:jason.welch@utsa.edu)

**Monday April 19** – You will receive an email from your “Budget Office Point of Contact”

*(Your POC will be one of these three: Tammy Anthony, Paula Pierson or Elizabeth Bay)*

- Guide to Balancing Cost Centers in Hyperion (Will be added to our Website)
- Hyperion Change Request Form (Will be added to our Website)
- 1<sup>st</sup> Excel Report – Cost Center Balances FY22 Sent 4-19-2021
- Moving forward, email your “Budget Office Point of Contact” if you have questions and add a copy to the secondary point of contact in case your primary is out of the office.

**Date TBD** – Additional Information that will help you when planning your budgeted expenses.

***These are for your use only. You do not need to return or update these reports.***

- Position Report – Provides details on the load to Hyperion
- Additional Pay Report (aka supplemental pay)
- Longevity Report