Hyperion Meeting – FY2023 Budget Development
Agenda
Two Meeting Options: Thursday 4-7-2022 or Friday 4-8-2022

Leading the Meeting Budget and Financial Planning: Elizabeth Bay, Sungho Hong, 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 FY2023 UT System Budget?

Revenue Forecasts: Net Sales and Services, Non-Mandatory Fees, Mandatory Fees, Differential Tuition, Option 3/On-line Revenue and Other Revenue	✓
Revenue Transfers	✓
Position Budgets	✓
Permanent Budget Transfers for E&G/Designated Tuition submitted through April 9	✓
Cost Center Reviews & Balancing in Hyperion – Monday April 11 thru Friday May 6	

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 Cost Center Balancing Reports, submit HCR forms as needed to balance the cost centers.

3. Let's Review the Guide together…
     a. Types of Cost Center Adjustments to consider in order to balance (Page 2)
          i.   Non-Position Expense
          ii. Revenue Transfer
          iii. Position Funding
          iv. Revenue Projections
     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 (starting on Page 4)
          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" (starting on Page 6)
    i. Firefox is preferred browser *(Note – there is a new link this year, so don't use an old one)*
    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
    vii. Cost Center Balance Report options *(Note – new report this year)*

4. Next Steps – what to expect…
    The week of April 11 – 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

    The week of April 11 – You will receive an email from your "Budget Office Point of Contact"
    (Your POC will be one of these three: Paula Pierson, Elizabeth Bay or Sungho Hong*)*
    - Guide to Balancing Cost Centers in Hyperion (Will also be added to our Website)
    - Hyperion Change Request Form (Will also be added to our Website)
    - 1st Cost Center Balancing Report – "Cost Center Balances FY23 Sent 4-11-2022"
    - Additional Information for your use only. You do not need to return or update these reports
        o Position Report – Provides details on the load to Hyperion
        o Additional Pay Report (aka supplemental pay)
        o Longevity Report

    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.