

# Anaplan BPSS – Frequently Asked Questions

## Position Planning

### **How do I plan for positions funded only through a specific date (e.g., retirement)?**

Enter the correct funding end date on the 06.05 Edit Funding Distribution page. For example, if a grant ends on 9/09/26, use that date as the funding end date and include a comment explaining the reason.

### **How do I budget supplements ending mid-year or not continuing?**

Zero out the supplement distribution percentage or enter funding end date and add a comment on the 06.05 Edit Funding Distribution page.

### **Can I view positions outside my home HR department?**

Yes, in the Report 10.06b Position Funding by Financial Department, units can view any positions utilizing a financial department within their unit. Contact the unit over the Home Department (HR Department) for edits on positions split between units.

### **How should I plan for a retire–rehire employee?**

Retire–rehire employees are not included in Anaplan because they fall below 0.75 FTE. Units should budget these funds on the Salaries-Casual Labor (525xxx) account code within the 04.00 Line-Item Budget page.

### **Are part-time employees included in Anaplan?**

No, they are not included in Anaplan because they fall below 0.75 FTE. Units should budget these funds on the Salaries-Casual Labor (525xxx) account code within the 04.00 Line-Item Budget page.

### **Are FYO and faculty overload supplements included?**

No, these supplements are not included in Anaplan.

### **How do I handle biweekly employee supplements?**

Anaplan does not include biweekly supplement comp rate codes. Units should budget these funds on the Per Serv Non-Faculty Budget (52xxxx) account code within the 04.00 Line-Item Budget page.

### **Will the system overnight refresh overwrite my position planning inputs?**

Yes—unless the position funding distribution is locked. Locked positions retain manual entries; unlocked ones update from OneUSG daily.

## Line-Item Budgeting

### Missing carryforward account codes?

Carryforward accounts are not available to units for line-item budgeting during the original budget process. Units approved to budget carryforward in original budget should contact the University Budget Office and provide the complete chartstrings. UBO will create and budget the chartstrings on the unit's behalf.

### Missing new chartstrings on input pages?

If a filter is applied, some chartstring rows may be hidden. Before adding a new row, clear all filters. Also ensure that any new chartstring created on 04.00 Line-Item Budget Template page has a budget amount entered. Chartstrings without budget are automatically removed during the daily system update to prevent duplication.

### Can I delete a chartstring row?

No.

### Who sets variance thresholds?

Variance thresholds are set by the Budget Office and will be documented in the BPSS Instructions.

### Do comments carry over to next year?

Yes. Prior-year comments remain viewable.

### Can I use wildcards for filtering?

No. Anaplan does not support wildcard filtering.

## Reporting and Balancing

### How do I check if revenue and expenses are balanced?

You can use Reports 10.04 Revenue and Expenses or 10.08 Departmental Fund Summary.

### Do actuals include encumbrances?

No. Most reports and pages show actuals without encumbrances.

**Tip:** Additional Anaplan training resources are here [Knowledge Base - Budget Management & Planning System](#).