

Fiscal Year 2027: Budget & Planning Process
Ithaca & Cornell Tech

For questions, please contact ubo-help@cornell.edu

Date	Description
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December through January

December 10	FY26 Austerity Forecast – Templates shared via Box (Actuals thru Nov)
December 24	FY26 Austerity Forecast – Campus Submission Due
January 9	Longview Security - Campus validation emails sent
January 12	Commitments Shared via Box – FY26 Spend Projection & FY27 Confirmation
January 16	FY26 Base Budget Adjustment e-doc processing deadline
January 27	Initial load into Longview Budget Planning System
January 28-31	Board of Trustees (BoT) Meeting

February through March

February 6	Vacant position Clean-up ends
	Longview Security - Access validation due
February 9-20	Longview Budget System – Campus Training & Review Sessions
February 9	Longview opens to C Level Users (College / Unit)
	Finalize Commitment Details with UBO
	Planning assumption PDF posted
February 11-13	LTIP income loaded in Longview: Based on December share count (Contingent on BoT Approval)
February 16	Longview opens to D Level Users (Departments)
March 2	SIP Eligibility Finalized in Workday / Longview (Feb 28 Hire Cutoff)
	FY27 Budget Narrative Templates – Templates shared with Campus
March 3 (Est)	Workday Merit reports available for planning College & Unit Awards
March 9	Budget model data information posted
	Distribution of Capital reports for review with planned capital activity in FY27
	Longview closes to D Level Users (Departments)
March 13	Budget Letters Distributed

April through May

April 2, 9:00pm	Workday Data Cutoff for Trustee Budget Position Planning: Final deadline for all position/costing updates to integrate into Longview for the Trustee Budget proposal.
April 3	Workday to Longview Integration Disabled
April 7	FY27 Budget Narrative Templates – Campus Submission Due
April 9	Longview closes to C Level Users (College / Unit)
April 10-24	University Roll-up & Analysis completed for campus leadership review
April 10	FY26 Austerity Forecast – Templates shared via Box (Actuals thru March)
April 24	FY26 Austerity Forecast – Campus Submission Due
April 27 - May 1	(If required) – Longview Budget Planning System reopened to accommodate leadership directives
May 8	May Book completed for BoT
May 20 - 22	Board of Trustees (BoT) Meeting
May 25 (Est)	Workday Merit Grids Open: Unit planners manage Faculty/Academics; HR Partners manage Staff. Comments required for all \$0 increases (e.g., performance, terminated, or in offer).
May 26 - June 2	Set Trustee Budget in Longview (all subsequent dates listed pertain to the Final Budget – <u>not</u> Trustee Budget). Load TB to KFS.

June through July

June 3	Workday to Longview integration re-enabled at 9PM (pending BoT budget approval)
June 4 - 8	Longview Budget Planning System module open to College & Unit Level Users Upon Request
June 8	Close Longview Budget Planning System to all level users at 9pm
June 15 (Est)	Longview Budget Planning System updated to include SIP Awards.
	Workday Data Cutoff for Final Budget Position Planning.
June 16 (Est)	Workday integration disabled (Workday integration the previous night will be the base data for SIP apply)
June 19 (Est)	Workday to generate Merit notification letters to employees
June 22 - June 26	Longview Budget Planning System planning modules reopened at Noon to College & Unit level users for Final Balancing of accounts
June 29	UBO begins review of Final Budget
July 1	New Compensation rates go into effect
July 17 (Est)	DFS Year End Closing
July 20 (Est)	FY27 Final Budget loaded to KFS (Note: Requires DFS Year-end closing to be complete)
July 21 (Est)	Re-enable Workday integration when FB load to KFS is complete