

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

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| 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

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| 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

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| 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

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| 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 |