Office of Planning and Budgets
Budget Planning and Analysis

HEIDI Dean Expense
HEIDI Dean Expense – Introduction

HEIDI Dean Expense application in Cognos Planning Analytics is used by OPB to split dean office expenditures into Instructional and Academic Administration categories. These categorized expenses are then used in the HEIDI annual reporting.

- **Instructional Expenditures** – Expenditures for all activities that are part of an institution’s instruction program.
  - Expenditures for Credit Courses – (1) academic, vocational and technical instruction; (2) remedial and tutorial instruction; and (3) regular, special and extension sessions.
  - Other Expenditures – (1) departmental research and public service expenditures not separately budgeted; and (2) department chairpersons expenditures. Exclude expenditures for academic administration when primary assignment is administration – for example, academic deans.
HEIDI Dean Expense – Introduction

- **Academic Administration Expenditures** - Expenditures incurred specifically for providing administrative and management support to academic programs. Includes expenditures for -
  - Academic deans including deans of research, graduate schools and colleges.
  - Academic advising - formally organized and / or separately budgeted.
HEIDI Dean Expense – Split Process

- HEIDI Dean Expense application derives percentage split between Instructional and Academic Administration expenditures
- Accounts with split dean expenditures from prior fiscal year (FY) are the starting point for accounts in the current FY.
- The department / PCode from prior FY carries over to the current FY.
HEIDI Dean Expense – Split Process

- For current FY, enter Total Account Expenditure
- If a department / PCode –
  - applies for the current FY, fill in the applicable expenditures.
  - does not apply for the current FY, either leave the amount as blank or remove the department / PCode.
- If a PCode is selected, an amount must be entered.
- To change / add new PCode, use the dropdown in the column to select.
- The Total Account Expenditure, Total Amount Allocated and Remaining Amount to Allocate are summarized at the top of each account.
- The Remaining Amount to Allocate must equal zero; it is highlighted if not.
- When all entries are complete, Commit and Submit
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