

STRATEGIC PLAN GOAL: TO SUSTAIN A THRIVING AND EFFECTIVE COLLEGE

STATE BUDGET REQUEST FORM INSTRUCTIONS

2019-2020

The State Budget Request Form has been simplified for the Fiscal Year 19/20. The template provided requires the budget holders to complete a form for EACH of their State Accounts.

Please follow the steps to complete this form:

1. Complete the cells for Vice President, the Account Number, the Budget Holder, and the Account Name.
2. Login to Business Intelligence (BI) to complete the sections related to the Fiscal Year(s). In BI, the Budget Holder will click on to the "Account Summary" dashboard, enter the "Account number", change the Fiscal Year, as necessary, and click "Apply".
3. From BI, enter the "Expenditure Total" for Temp Service (TS), and the "Expenditure Total" for Other Than Personal Service (OTPS) for **FY 17/18**. The Total Expenditures column will automatically calculate.
4. Change the Fiscal Year to **18/19**, enter the "Actual Expenditures" to Date for TS and OTPS to the State Budget Request Form. The Total Expenditures column will automatically calculate.
5. The final line of **FY 19/20** will be calculated entered by the Budget Holder based on the prior year actual and year to date expenditures, and any changes/additions the budget holder anticipates. The Total Expenditures column should automatically calculate.

The cells, "5% of OTPS" (D16), and "FY 19/20 – Total with 5% Reduction in OTPS" (D17), will auto-populate.

Budget holders are also required to complete and submit answers related to the questions in the text boxes provided.

Please contact the Carol Vosatka or Laura Gross for assistance in navigating in the SUNY Business Intelligence (BI) module.