

# ALERT NOTICE

## Business Office

Issued: February 28, 2019      Number: 2019-29

### Extension: Fiscal Year 2020 Expense Budget Requests Due March 8, 2019

The deadline for the Fiscal Year 2020 expense budget requests has been extended to **March 8, 2019**.

Please note that for Fiscal Year 2020, Financial Managers will be able to view but **not** change their department's budget requests in the Budget Development Application.

Financial Managers who would like to revise their department's budget requests must complete and submit the Request for Revision to FY 2020 Operating and Travel Expense Budget Form (BO-8520) or the Request for Revision to FY 2020 Capital Expense Budget Form (BO-8530) to the appropriate Vice President or the President, if the Financial Manager reports directly to the President. The Request for Revision to FY 2020 Operating and Travel Expense Budget Form or the Request for Revision to FY 2020 Capital Expense Budget Form (BO-8530) must be received by the Business Office by **March 8, 2019**. Please refer to the Budget Development Guidelines for additional information.

Instructions on accessing the Budget Development Application, the Request for Revision to FY 2020 Operating and Travel Expense Budget Form (BO-8520), and the Request for Revision to FY 2020 Capital Expense Budget Form (BO-8530) are attached or may be downloaded from the Business Office website at [https://finance.southtexascollege.edu/businessoffice/budget\\_download.html](https://finance.southtexascollege.edu/businessoffice/budget_download.html).

All expense budget requests must be itemized in the "Notes" section of the Budget Development Application. Additionally, in order to comply with SACSCOC requirements, expense budget requests associated with an I.E. Plan objective must be linked to the appropriate I.E. Plan objective in the "Notes" section of the Budget Development Application. Please see section below regarding the I.E. Plan.

Only Financial Managers and additional users requested through the Banner Budget Development Access Request Form (BO-8500) will have access to view budgets and itemize budget requests in the "Notes" section of the application. Please complete the form to request additional or new access to the Budget Development Application.

Once you access the application, please verify that all the organizations you can access are indeed under your control. If an organization is incorrectly coded, please proceed by submitting the "Request to Change Financial Managers" (BO-4800) form.

The request forms are attached and are available on the Business Office website at <https://finance.southtexascollege.edu/businessoffice/BO-forms.html>.

If you have any questions, please contact the Budget Department

Aika Nguma at [anguma@southtexascollege.edu](mailto:anguma@southtexascollege.edu) or 872-4644

Elena Elizalde at [elenae@southtexascollege.edu](mailto:elenae@southtexascollege.edu) or 872-4620

Nicole Perez at [mnperez@southtexascollege.edu](mailto:mnperez@southtexascollege.edu) or 872-4640

# Budget Development Guidelines

## Budget Guidelines for Fiscal Year 2020

The expense budgets for operating and travel will be rolled over to Fiscal Year 2020 at the same amount as the Fiscal Year 2019 original budget. Please note that the original budget does not reflect budget transfers that were made throughout the fiscal year. In order to request a budget for new organizations created during Fiscal Year 2019, please complete and submit the request forms mentioned below.

The expense budgets for capital will not be rolled over and will have a \$0 budget in Fiscal Year 2020.

All changes to the Fiscal Year 2020 rolled budget must be approved by the appropriate Vice-President or President, if the Financial Manager reports directly to the President. The appropriate Vice President or President will submit the forms to the Business Office. Upon receipt of the completed and approved Request for Revision to FY 2020 Operating and Travel Expense Budget Form or the Request for Revision to FY 2020 Capital Expense Budget Form, the Business Office will enter changes to the Fiscal Year 2020 expense budgets in the Budget Development Application. Changes that require approval include the following:

- Increases to the budget amount
- Decreases to the budget amount
- Budget reallocations within departments

Financial Managers must itemize all budget requests in the “Notes” section of the Budget Development Application.

## Institutional Effectiveness (I.E.) Plan Information

1. Expense budget requests associated with an I.E. Plan objective must be linked to the appropriate I.E. Plan objective in the “Notes” section of the Budget Development Application.
2. Financial Managers who are not requesting a revision to their operating or travel expense budget requests must log in to the Budget Development Application and link the appropriate I.E. Plan objective to the appropriate expense budget items.
3. Financial Managers who are requesting a revision to their department’s operating, travel, or capital expense budget must provide the I.E. Plan objective on the Request for Revision to FY 2020 Operating and Travel Expense Budget Form or the Request for Revision to FY 2020 Capital Expense Budget Form mentioned below.

## General Budget Information

1. Please review each Unrestricted and Auxiliary organization’s operating and travel expense budget.
  - Operating Budget: Items in which the unit cost is less than \$5,000.00.
  - Travel Budget: Travel costs that will be incurred during the fiscal year.
2. Financial Managers who would like to revise their department’s operating or travel expense budget requests must complete and submit the Request for Revision to FY 2020 Operating and Travel Expense Budget Form to the appropriate Vice President or the President, if the Financial Manager reports directly to the President. The Request for Revision to FY 2020 Operating and Travel Expense Budget Form must be received by the Business Office by **March 8, 2019**.
3. Financial Managers who would like to request a capital expense budget must complete and submit the Request for Revision to FY 2020 Capital Expense Budget Form to the appropriate Vice President or the President, if the Financial Manager reports directly to the President. The Request for Revision to FY 2020 Capital Expense Budget Form must be received by the Business Office by **March 8, 2019**.
  - Capital Budget: Items in which the unit cost is equal to or greater than \$5,000.00.
4. Please note that all expense budget requests for operating, travel, and capital must be itemized in the “Notes” section of the Budget Development Application (see step 3 of the Budget Development Application Instructions). Itemizations must also specify the applicable I.E. Plan objective that will be met with the requested budget. Travel expense budget itemizations must include:
  - The name of the conference/event
  - The number of attendees per conference/event

In order to create new organizations, you must complete and submit a “Request to Setup a New Organization” (BO-4910) form to the Business Office. The Business Office must create the new organization before a FY 2020 budget can be assigned.

The Business Office must receive all requests to change the operating, travel, and capital expense budgets by **March 8, 2019**.

If you have any questions, please contact  
Aika Nguma at [anguma@southtexascollege.edu](mailto:anguma@southtexascollege.edu) or 872-4644  
Elena Elizalde at [elenae@southtexascollege.edu](mailto:elenae@southtexascollege.edu) or 872-4620  
Nicole Perez at [nnperez@southtexascollege.edu](mailto:nnperez@southtexascollege.edu) or 872-4640