

# **Instructions for FY25 Online Budget Submission**

- The e-mail you were sent from the Budget Office contained a link to the Online Budget Entry System. Click on the link in the e-mail, follow the direct [link](#), or copy and paste the following link into your web browser (<https://spapps.siu.edu/nonstatebudget>).
- Login to SharePoint using your e-ID and password that are used to access all campus systems. If you are currently logged in, you should not have to complete this step.
  - Note: The webpage is also mobile friendly.
- You should see a heading titled, “**Your Available Budget Purchase Numbers**”. In this section you should see all budget purposes that you are currently listed as the Fiscal Officer or Fiscal Officer Delegate. The Budget Purposes are listed numerically in the first column followed by the Budget Purpose Description, Fiscal Year, and Stage.
  - Note: **We will request the FY25 Budgets for the state accounts (72xxxx) that are included in the Online Budget Entry System at a later date.**
  - We are aware that some Budget Purposes are inactive. Please e-mail us at [budgetoffice@siue.edu](mailto:budgetoffice@siue.edu) to indicate any inactive accounts. **You also need to send the proper paperwork to Administrative Accounting to close these accounts in AIS.** To obtain the proper paperwork click [here](#) or visit ([https://www.siu.edu/its/ais/eforms/pdf/account\\_changes\\_discountinue.pdf](https://www.siu.edu/its/ais/eforms/pdf/account_changes_discountinue.pdf)).
- **Available Stages:**
  - **Not Started**
    - All Budget Purposes should be in this stage at the beginning of the Fiscal Year Budget Cycle.
  - **Started**
    - Budget Purposes that you have started but are incomplete will remain in the started stage.
  - **Approval**
    - The Fiscal Officer and/or Fiscal Officer Delegate will be prompted to Approve or Deny the Budget Form once it has been submitted.
    - Additional Vice Chancellor level approval, if required, would occur at this stage.
  - **Budget Office**
    - After the Budget Form has been approved it is sent to the Budget Office for approval. If there are any questions or concerns, the Fiscal Officer, Fiscal Officer Delegate, and/or the approver will be contacted.
    - It should be noted that after the Budget Form has been approved and sent to the Budget Office, in order for the Fiscal Officer to make any necessary changes, the Budget Office will have to deny your form so that it can be sent back to the Fiscal Officer to make any changes for resubmission.

- **Completed**
  - Once the Budget Office approves the Budget Form for each Budget Purpose they will be kept in this stage.

- **Directions on Completing Your Non-State Budget Form:**

- To start a Non-State Budget Form (Budget Purposes 73xxxx, 74xxxx, 75xxxx, and 77xxxx), click on [edit](#). This will automatically open the Non-State Budget Form for that specific Budget Purpose and automatically scroll the screen down to the beginning of the form. Data that is input into the form will automatically save and auto-calculate. To choose a different Budget Purpose scroll back up towards the top of the webpage.
- **Remaining FY24 Projections (FY24 Ending Cash/FY25 Beginning Cash Balance)**
  - Cash balances are a very important component of your budget. **Please estimate as accurately as you can the cash you will have remaining in your account on 6/30/24.**
  - The 4/30/2024 cash balance has already been loaded into your form for you.
  - Please estimate the cash balance accordingly by entering any additional revenue and expenditures you are projecting for the remainder of this fiscal year.
  - **Both the revenue and expenditure entries should reflect a positive number.**
  - As the FY24 projected revenues and expenses are entered, the form will automatically calculate your Estimated FY25 Cash Balance on 7/1/2024.
- **FY25 Projected Revenues & Expenditures**
  - Please provide your revenue and expense budget **by line/object code for ALL Budget Purposes.**
  - **Both the revenue and expenditure entries should reflect a positive number.**
  - As the FY25 projected revenues and expenses are entered, the form will automatically calculate your FY25 Estimated Revenue and FY25 Estimated Expenditure lines.
  - To enter your FY25 revenues and expenses, select the object code from the drop-down box.
    - It is important to note that once the object code is selected it cannot be changed. You would need to delete the line by clicking on the trash icon.
  - **SALARIES - You will be unable to select, enter, or edit the budget for salaries.** Beginning in FY24, the Budget Office launched a Position Control System (PCS). The data you provide on your FY25 PCS sheets will be automatically uploaded to the salary line on this budget form and will be the amount used for your FY25 salary budget.
    - As a result, you will need to complete your FY25 PCS sheets for each non-state account with salary expenses in order to finalize your budget submission.
    - Once your original non-state budgets have been approved, access to the FY25 PCS sheets for the original budget will be removed and the FY25 original budgets will be frozen. The Budget Office will then send a new link to your FY25 PCS sheets for you to make monthly salary updates.

- Additional lines can be added for revenue and expense by clicking the Add Line button under each section. If you would like to remove a line, click on the red trash icon next to the column titled, "Budget Amount".
  - If you would like to add a note to provide additional information to the Budget Office on the revenue/expenses listed, click the button titled Add Note under each section.
  - If you would like to see your prior year budget submission, click on the drop-down menu above each section titled Expand Previous Year Revenue or Expand Previous Year Expenditures.
- **Submission:** Once the form is complete click **Submit Form** located in the upper right-hand corner. An approval note can also be added prior to your submission.
  - **Approval:** If you are the Fiscal Officer, clicking **Submit Form** from the prior step certifies as the approval. If you are the Fiscal Officer Delegate, click on the Approval stage and select the Budget Purpose you would like to approve by clicking **Review**. A note can also be added prior to your approval.
    - Once ready to approve, click **Approve** in the upper right-hand corner. A pop-up will be generated asking you to confirm your approval.
    - **If you are not the Fiscal Officer and/or Fiscal Officer Delegate, the request for approval will be sent to the Fiscal Officer and Delegate listed in AIS.**
  - **Budget Office Review:** After the Non-State Budget form is approved it will be sent to the Budget Office for review and final approval. If the form requires changes, it will be denied and sent back to the **Started** stage. At this point, the Non-State Budget form will need to be adjusted and resubmitted to reflect any changes previously discussed with you by Budget Office staff.
    - **The approval stage will have to be completed again as well for all Non-State Budget forms that were originally denied and required to be resubmitted with changes.**

## • **Directions on Completing Your State Budget Form:**

- To start a State Budget Form (Budget Purpose 72xxxx), click on edit. This will automatically open the State Budget Form for that specific Budget Purpose and automatically scroll the screen down to the beginning of the form. Data that is input into the form will automatically save and auto-calculate. To choose a different Budget Purpose scroll back up towards the top of the webpage.
- **FY25 Projected Expenditures**
  - Please provide your expense budget **by line/object code for ALL Budget Purposes**.
  - **The expenditure entries should reflect a positive number.**
  - As the FY25 projected expenses are entered, the form will automatically calculate your FY25 Estimated Expenditure line.
  - To enter your FY25 expenses, select the object code from the drop-down box.
    - It is important to note that once the object code is selected it cannot be changed. You would need to delete the line by clicking on the trash icon.

- **SALARIES** - **You will be unable to select, enter, or edit the budget for salaries.** Beginning in FY24, the Budget Office launched a Position Control System (PCS). The data you provide on your FY25 PCS sheets will be automatically uploaded to the salary line on this budget form and will be the amount used for your FY25 salary budget.
    - As a result, you will need to complete your FY25 PCS sheets for each state account with salary expenses in order to finalize your budget submission.
    - Once your original state budgets have been approved, access to the FY25 PCS sheets will be removed and the FY25 original budgets will be frozen. The Budget Office will then send a new link to your FY25 PCS sheets for you to make monthly salary updates.
  - Additional lines can be added for expenses by clicking the Add Line button under each section. If you would like to remove a line, click on the red trash icon next to the column titled, "Budget Amount".
  - If you would like to add a note to provide additional information to the Budget Office on the expenses listed, click the button titled Add Note under each section.
  - If you would like to see your prior year budget submission, click on the drop-down menu above each section titled **Expand Previous Year Expenditures**.
- **Submission:** Once the form is complete click **Submit Form** located in the upper right-hand corner. An approval note can also be added prior to your submission.
  - **Approval:** If you are the Fiscal Officer, clicking **Submit Form** from the prior step certifies as the approval. If you are the Fiscal Officer Delegate, click on the Approval stage and select the Budget Purpose you would like to approve by clicking **Review**. A note can also be added prior to your approval.
    - Once ready to approve, click **Approve** in the upper right-hand corner. A pop-up will be generated asking you to confirm your approval.
    - **If you are not the Fiscal Officer and/or Fiscal Officer Delegate, the request for approval will be sent to the Fiscal Officer and Delegate listed in AIS.**
    - **All state budgets will require the approval of the respective VC area budget director in order to confirm that the sum of all state budgets for a VC area ties to the state budget target that was provided by the Budget Office.**
  - **Budget Office Review:** After the State Budget form is approved it will be sent to the Budget Office for review and final approval. If the form requires changes, it will be denied and sent back to the **Started** stage. At this point, the State Budget form will need to be adjusted and resubmitted to reflect any changes previously discussed with you by Budget Office staff.
    - **The approval stage will have to be completed again as well for all State Budget forms that were originally denied and required to be resubmitted with changes.**