Annual Budget Requests

February 3rd, 2020

Office of Budget & Fiscal Planning
www.ramapo.edu/budget
budget@ramapo.edu
Entering a Budget Change Request for the Next Fiscal Year

To enter requests into Adaptive, you will have to be able to edit sheets. Some Adaptive seats are unable to edit sheets, so your Adaptive settings will have to be temporarily changed for the requests to be entered. If you cannot edit the sheet, please contact Alexia Mavros (amavros@ramapo.edu) to have your access changed.

- Click on the Navigation Icon. Highlight Sheets, choose “Input Sheet - Budget Change Requests”.

If you do not see the sheet it may be because of the version you have selected. Click on the word “SHEETS” to go the Sheets Overview. From there, change the version to Revised Budget 2020

Sample Input Sheet

- Make sure you are in the version “Revised Budget 2020”.
In the top right corner, click the drop down arrow, which will reveal a search bar and menu.

Type the Organization/Level code, press enter, and select it from the list.

On the toolbar, click the Add Row icon.

Under Division, select the appropriate Division from the drop down list.

Under Requesting Fund, select the appropriate Fund from the drop down list.

TIP: - You can also type in the fund code - Press Enter and select from the list

Under Requesting Program, select the appropriate Program.

Under Amt Requested, enter the amount being requested.

Under Recurring Yes/No, select either Yes or No.

Under Unit’s Description of Request, enter the description for your request with specific details.

Under Strategic Goals, indicate if this request is for a general operational need (by selecting Operational increase/decrease) or related to one of the Four Strategic Goals, by selecting one of the four goals.
➢ Under Goal Description, **explain how this request will help your unit fulfill one of the College’s strategic goals**

**Sample of Completed Request**

<table>
<thead>
<tr>
<th>#</th>
<th>DIVISION</th>
<th>REQUESTING FUND</th>
<th>REQUESTING PROGR.</th>
<th>AMT REQUIRED</th>
<th>RECURRING YES/NO</th>
<th>UNIT'S DESCRIPTION OF REQUEST</th>
<th>STRATEGIC GOALS</th>
<th>GOAL DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>VPAF</td>
<td>10001 General College Fund</td>
<td>60 Institutional Support</td>
<td>1,000</td>
<td>Yes</td>
<td>Adaptive Maintenance Increase</td>
<td>Operational increase/decrease</td>
<td>To update Adaptive...</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

➢ **Click Save when finished.**
Documentation

Though not required at this time, documentation regarding the details of your FY20 budget request will assist Division VPs to understand how the request supports the Strategic/Goal Objectives of the Strategic Plan. After submitting your request in Adaptive, please email any supporting documentation to budget@ramapo.edu. Documentation is only required when requesting to release the funds.

Entering a Capital Request for the Next Fiscal Year

To enter requests into Adaptive, you will have to be able to edit sheets. Some Adaptive seats are unable to edit sheets, so your Adaptive settings will have to be temporarily changed for the requests to be entered. If you cannot edit the sheet, please contact Alexia Mavros (amavros@ramapo.edu) to have your access changed.

- Click on the Navigation Icon. Highlight Sheets, choose “INPUT SHEET – FY21 CAPITAL”.

If you do not see the sheet it may be because of the version you have selected. Click on the word “SHEETS” to go the Sheets Overview. From there, change the version to Revised Budget 2020.
Make sure you are in the version “Revised Budget 2020”.

In the top right corner, click the drop down arrow, which will reveal a search bar and menu.

Type the Organization/Level code, press enter, and select it from the list.

On the toolbar, click the Add Row icon.

Fill in the fields with the appropriate data and click Save when finished.
Exporting To Excel

To keep a record of the Budget Requests from the input sheet in Adaptive, simply click the download button on the toolbar.

Depending on the browser you are using, you may be asked to open or save the file.

- If you are using Chrome, the file may have already downloaded, and you can view it by clicking on the notification on the bottom left corner of your screen.

Should you have any questions or need additional assistance with exporting the Budget Change Requests sheet, please contact the Budget office at ext. 7703.
See below for information on releasing budget change request funds.

Releasing Budget Change Request Funds

To request the release of funds, please email budget@ramapo.edu and include the following:

- indicate that the request is a Budget Change Request
- the FOAP of which the funds should be released to
- a description of the request that matches the original request in Adaptive
- attach appropriate documentation (see below)

**Required Documentation**

All requests are required to have supporting documentation attached to the email in order for the release of funds. Appropriate documentation is a contract or quote with any changes clearly shown (a screenshot from Banner or only providing an Excel spreadsheet analysis is not acceptable).

In addition, invoices from the previous year, together with the new quote, must be provided. For example, if there has been an increase from the previous year, attach an Excel worksheet illustrating the following:

- prior year amount
- new amount
- increase between the amounts

Please email budget@ramapo.edu or call ext. 7703 with any questions regarding documentation.
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