Annual Budget Change Request Process

January 2024

Office of Budget & Fiscal Planning
www.ramapo.edu/budget
budget@ramapo.edu

Using Adaptive Dashboard to Evaluate Needs

Before entering any requests into Adaptive, please review the unit's budget in detail to acquire more context when determining increases or decreases.

Home Dashboard
https://login.adaptiveinsights.com/app

Upon logging in, there's a new tab for this process called **BUDGET CHANGES**. This is where all FY25 Budget Changes will be entered into Adaptive.
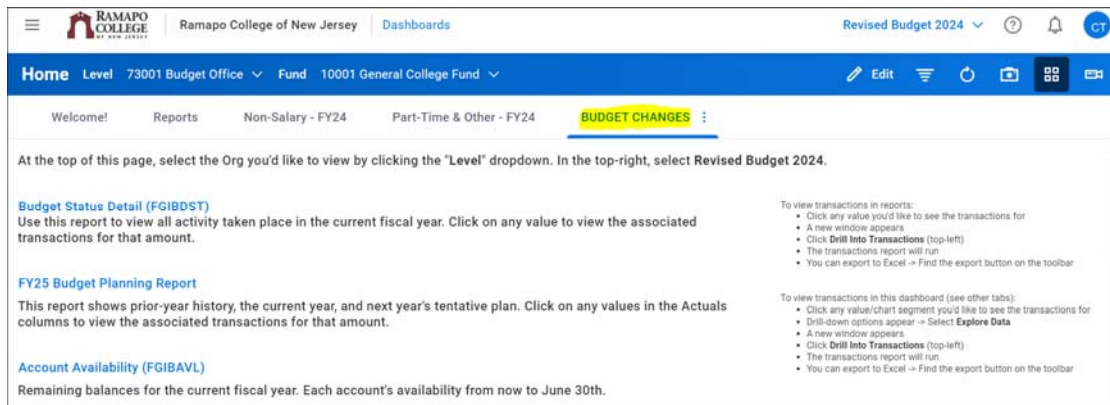
The top section of this tab has links to reports (in blue) for detailed analysis of any budget accessible by the user. Read the tips on the right of the screen for instructions on how to produce a list of transactions, should the need arise.

The existing tabs of the Home Dashboard are available for analysis as well.
For example, click the **Non-Salary - FY24** tab for at-a-glance views of budget data
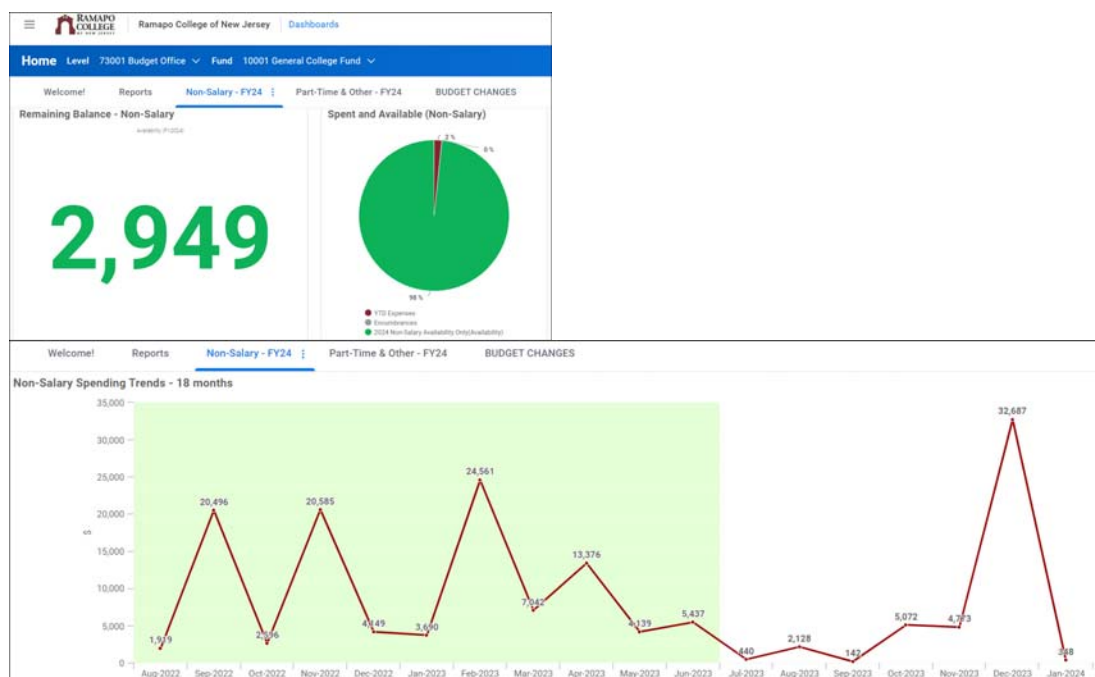
Entering a Budget Change Request for the Next Fiscal Year

To enter changes into Adaptive, the ability to edit sheets is required. Some Adaptive users are unable to edit sheets, so your Adaptive settings may have to be temporarily changed for the requests to be entered. If you cannot edit the sheet, please contact Chris Tredici (ctredici@ramapo.edu) to have your access changed.

Entering FY25 Budget Changes

On the **BUDGET CHANGES** tab of the Home dashboard, scroll to the bottom section. Make sure your version in the top-right of the screen is set to **Revised Budget 2024.**

Follow the instructions and scroll down to find the input sheet:

Sample of Completed Request
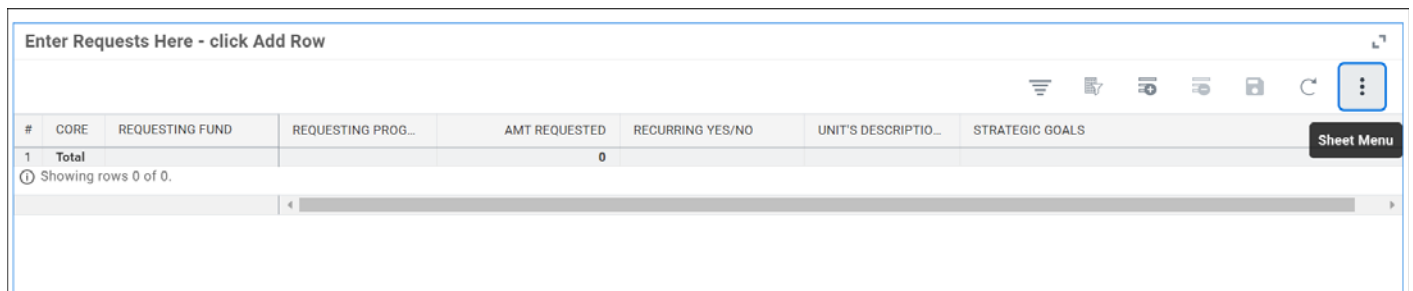
Documentation

Though not required at this time, documentation regarding the details of your FY24 budget request will assist Core VPs to understand how the request supports the Core's and the College's goals. After submitting your request in Adaptive, please email any supporting documentation to budget@ramapo.edu . Documentation is, however, required when requesting to release the funds during the fiscal year.

Exporting Completed Requests to Excel

To keep a record of the Budget Changes from the input sheet in Adaptive, click the three dots to access the sheet menu, then select **Download**.

Should you have any questions or need additional assistance with exporting the Budget Change Requests sheet, please contact the Budget office at budget@ramapo.edu.

Releasing Budget Change Request Funds

Requests for the release of Approved FY25 Budget Change funds must be made by **June 1st, 2025**.

Approved Budget Change funds will not be released until existing funds in the unit's pool are exhausted.

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

- "Budget Change Request" & "Unit name" in the subject line
- FOAP where funds should be released to
- description that matches the original request in Adaptive
- appropriate documentation (see below)

Required Documentation
All requests to release funds are required to have supporting documentation attached to the email. Appropriate documentation is an invoice, 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 with any questions regarding documentation.

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