Annual Budget Change Request Process

January 2026

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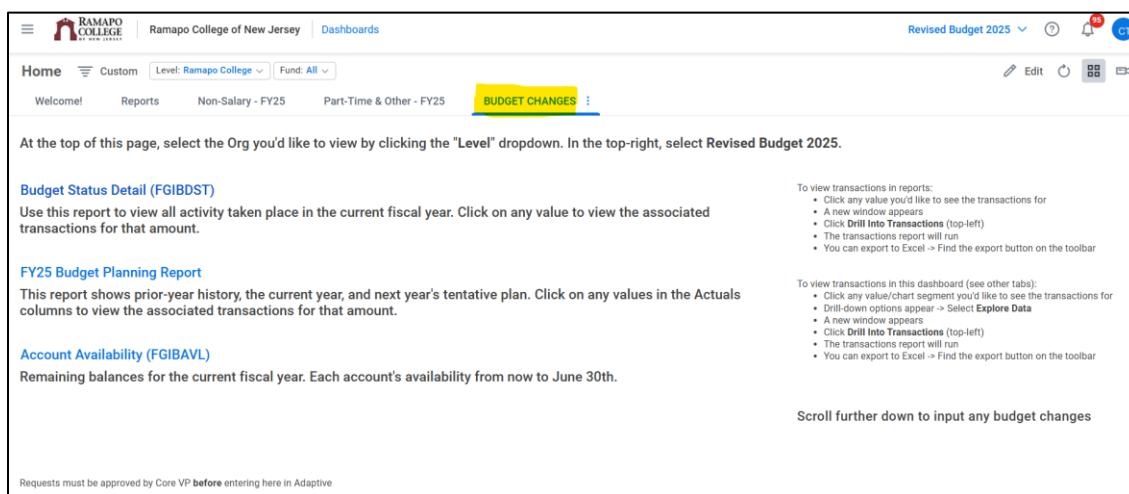www.ramapo.edu/budget
budget@ramapo.edu

Using Adaptive Dashboards to Evaluate Budget 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://idp.ramapo.edu/idp/profile/SAML2/Unsolicited/SSO?providerId=https://login.adaptiveinsights.com:443/samlsso/UkFNQVBPX1NBTkRCT1gy

Upon logging in, there's a new tab for this process called **BUDGET CHANGES**. This is where all FY27 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 - FY26** tab for at-a-glance views of budget data
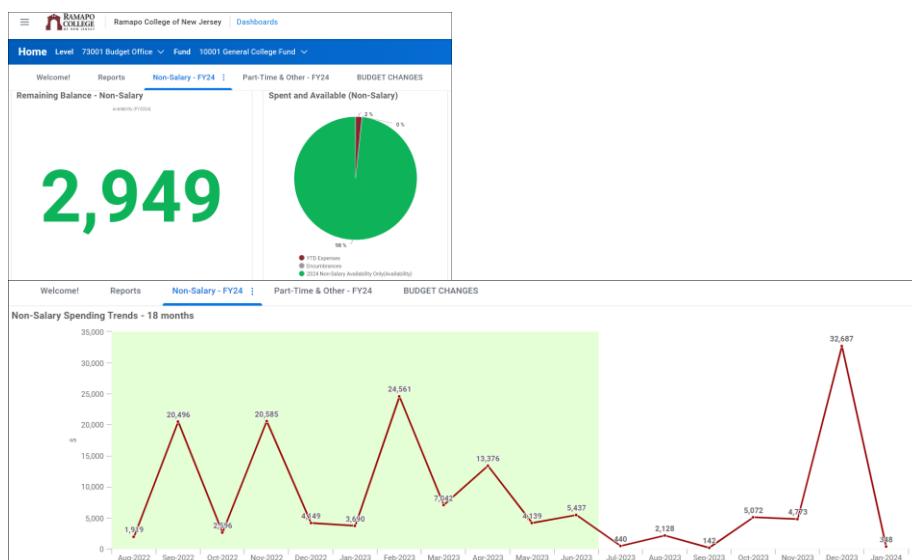
To enter changes into Adaptive, the ability to edit sheets is required. Some Adaptive users are unable to edit sheets, so your Adaptive settings may have to be temporarily changed for the requests to be entered. If you cannot edit the sheet, please contact Chris Tredici (ctredic1@ramapo.edu) to have your access changed.

Entering FY27 Budget Changes

On the **BUDGET CHANGES** tab of the Home dashboard, scroll to the bottom section. Make sure the version in the top-right of the screen is set to **Proposed Budget 2027.**

Scroll down to find the input sheet:

1. Click the Add Row button

2. **Core:** the Core will default to your associated College Core
3. **Requesting Fund:** Select the Fund from the drop down list (DO NOT select "Operating")
4. **Requesting Program:** Select the associated Program code
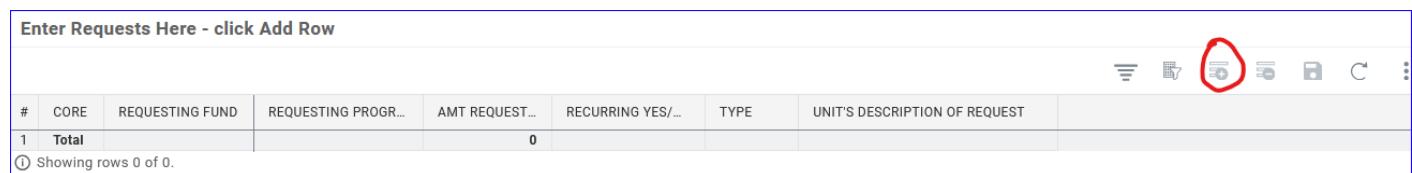5. **Amt Requested:** Enter the $ amount requested
6. **Recurring Yes/No:** Select *Yes* for recurring if this will be required in FY27 & future years, select *No* if this is a one-time need for FY27 only
7. **Type:** select Mandatory or Discretionary. Mandatory requests are those that are contractual
8. **Unit's Description of Request:**

   When entering requests in Adaptive, be sure descriptions are specific and that they will match the documentation/invoices used to request release of funds in FY27. <u>For example</u>, if a request was made for additional catering costs, but receipts/documentation submitted are for equipment rental, the request will be denied.

   Requests are for **incremental** increases -- documentation for release of funds must show the incremental difference in expense between FY26 & FY27, it is the unit's responsibility to show this increase when requesting release of funds with invoices and a spreadsheet detailing the differences.

Sample of Completed Request

Enter Requests Here - click Add Row							
#	CORE	REQUESTING FUND	REQUESTING ORGN/LEV...	REQUESTING PROGR...	AMT REQUEST...	RECURRING YES/...	TYPE	UNIT'S DESCRIPTION OF REQUEST
+	Fiscal H...	10001 General Co...	73001 Budget Office	60 Institutional Supp...	5,000	Yes	Mandatory	Robot lease increase due to required insurance fee
1	Total				5,000			

Documentation

Though not required at this time, documentation regarding the details of your FY27 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 required when requesting release of funds to the operating budget 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**.

Enter Requests Here - click Add Row						
#	CORE	REQUESTING FUND	REQUESTING PROGR...	AMT REQUEST...	RECURRING YES/...	TYPE	UNIT'S DESCRIPTION OF REQUEST
1	Total			0			
ⓘ Showing rows 0 of 0.						

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 FY27 Budget Change funds must be made by **Tuesday, June 1ˢᵗ, 2027**.

Approved Budget Change funds will not be released until existing funds in the unit's pool (7001) 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 or new invoices, 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.

Budget Office Contacts

Should you have any questions, or need assistance with your budget or Adaptive, feel free to contact us.

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