

OVERVIEW

On the week before Spring Break of the current fiscal year, each school location will be requested to complete a Budget Entry regarding next fiscal year's budget. This allows each location to allocate their next fiscal year's budget to the budget unit / account numbers according to their individual needs.

To assist you in completing the budget entry, you should have received a memo from the Instruction Department advising you of your Instructional Budget Allocation. You should have also received a memo from the Business Office advising you when to enter your budget, deadlines and any exceptions.

The following pages include instructions to enter your budget into eFinance Plus.

There are three steps for you to follow to successfully complete your budget allocation:

1. Use the Budget Excel Worksheet provided. This Excel worksheet is a tool to assist you with the allocation of your Instructional budget.
 2. Using your Budget Excel Worksheet as a guide, enter your budget into the eFinance Plus Budget Preparation System.
 3. After budget is entered at the Rogers Center, print two copies of the Departmental Budget Worksheet, which will show your budget for next year.
- ◆ Keep one copy of the budget for your records
 - ◆ The Principal will be asked to sign and date one copy of the budget to be collected and kept by the Business Office.

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Connie Bergeson (Instruction Department) will budget the following:

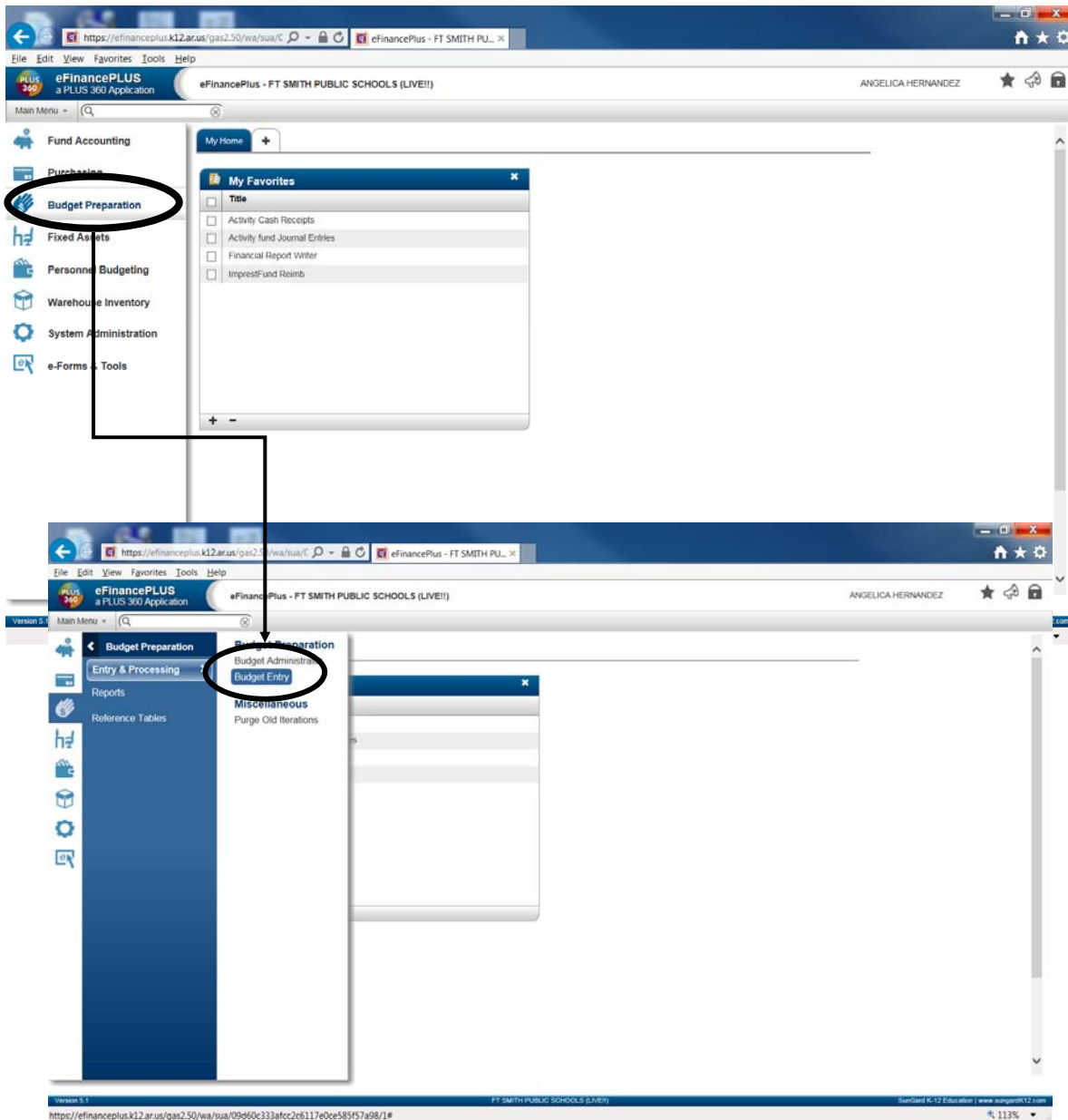
- Professional Development
- Vocational—Regular & Special
- Travel Conference—Teachers & Principals
- Auto Allowance
- Art & Music & PE (Elementary only)
- Postage
- Textbooks & E-Books

BUDGET ENTRY

eFinance Plus Entry

eFinance Plus ENTRY

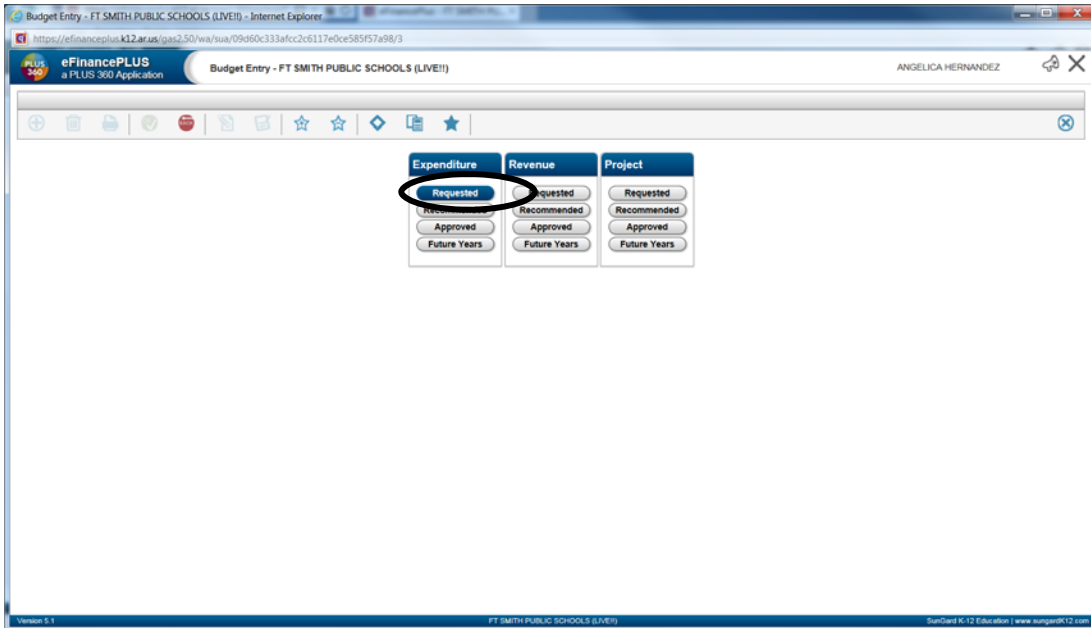
From the eFinance Plus Main Menu, select the following:
Budget Preparation → Budget Entry



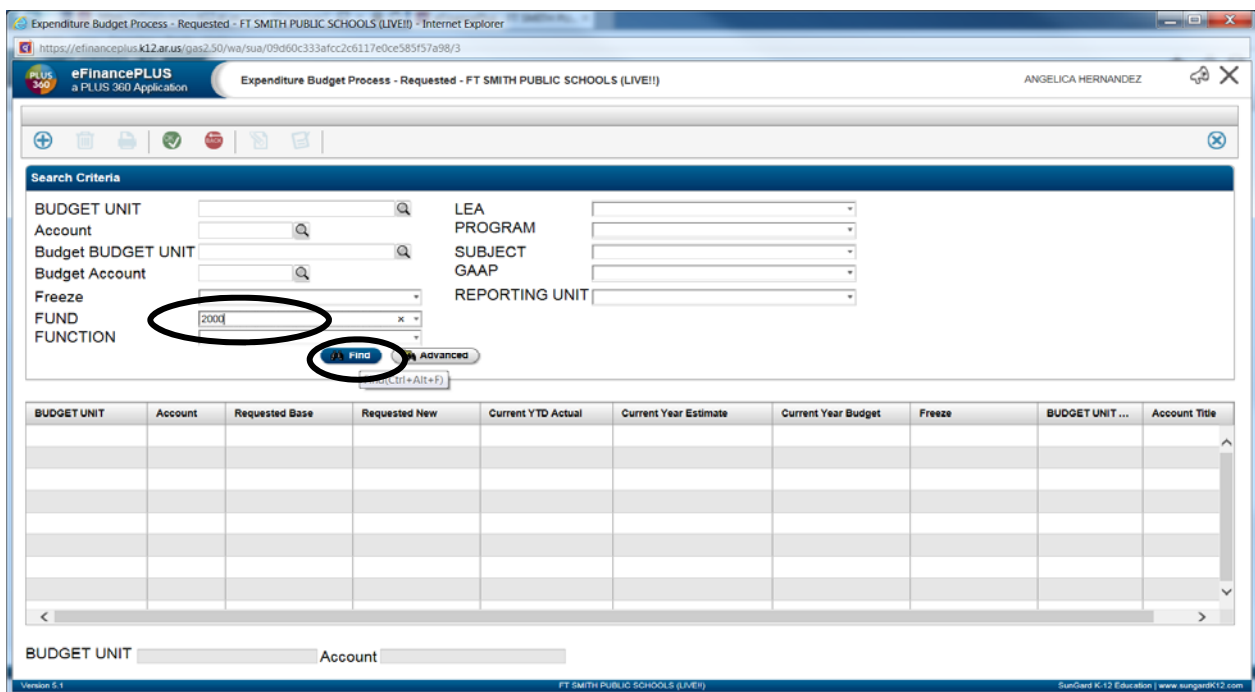
BUDGET ENTRY

eFinance Plus Entry

The “Budget Entry” window will appear on your screen. Select the **Requested** button located in the **Expenditure** column.



The “Expenditure Budget Process—Requested” window will appear on your screen.
Enter “2000” in the **Fund** box. (Belle Point should enter “2275”)
Select the **Find** button to process your request.



BUDGET ENTRY

eFinance Plus Entry

The bottom portion of the “Expenditure Budget Process” window will be accessible on your screen. You are now ready to enter your budget for next fiscal year.

Enter the amount you want to allocate for your next fiscal year’s budget in the **Requested Base** field next to the appropriate budget unit / account number.

Note: Do not change any field other than the **Requested Base**.

The screenshot shows the 'Expenditure Budget Process - Requested - FT SMITH PUBLIC SCHOOLS (LIVE!!)' window. The search criteria section includes fields for BUDGET UNIT, Account, Budget BUDGET UNIT, Budget Account, Freeze, FUND (set to 2000 - OPERATING FUND), and FUNCTION. Below this is a table with the following columns: BUDGET UNIT, Account, Requested Base, Requested New, Current YTD Actual, Current Year Estimate, Current Year Budget, Freeze, BUDGET UNIT..., and Account Title. The 'Requested Base' column is circled in black. The table shows 21393 matches found.

BUDGET UNIT	Account	Requested Base	Requested New	Current YTD Actual	Current Year Estimate	Current Year Budget	Freeze	BUDGET UNIT...	Account Title
2000111000100000	61120	0.00	0.00	0.00	0.00	0.00	N - Not Frozen	OPR KIND BLM KINI	REG EMPLOY
2000111000100000	61710	0.00	0.00	0.00	0.00	0.00	N - Not Frozen	OPR KIND BLM KINI	SUBSTITUTE
2000111000100000	62110	774.24	0.00	421.65	0.00	1,113.84	N - Not Frozen	OPR KIND BLM KINI	GROUP INSUR
2000111000100000	62120	0.00	0.00	0.00	0.00	0.00	N - Not Frozen	OPR KIND BLM KINI	GROUP INSUR
2000111000100000	62210	6,289.90	0.00	3,278.86	0.00	9,234.90	N - Not Frozen	OPR KIND BLM KINI	SOCIAL SECL
2000111000100000	62220	0.00	0.00	4.34	0.00	0.00	N - Not Frozen	OPR KIND BLM KINI	SOCIAL SECL
2000111000100000	62260	1,471.00	0.00	766.68	0.00	2,109.78	N - Not Frozen	OPR KIND BLM KINI	MEDICARE
2000111000100000	62270	0.00	0.00	1.01	0.00	0.00	N - Not Frozen	OPR KIND BLM KINI	MEDICARE CL



Before you select the **Back** button, make sure you select the **OK** button.

If you do not do this, your changes will not be processed and you will have to re-enter your budget.

After selecting **Ok**, you can scroll to the bottom of the column to check your total (it should match the amount noted in the memo you received from Instruction).

BUDGET ENTRY

Print Worksheet

PRINT WORKSHEET

From the eFinance Plus Main Menu, select the following;

Budget Preparation → Reports → under the Expenditure tab click on → **Requested Worksheet**

The screenshot displays the eFinancePLUS application interface. The main menu on the left includes options like Fund Accounting, Purchasing, Budget Preparation, Fixed Assets, Personnel Budgeting, Warehouse Inventory, System Administration, and e-Forms & Tools. The 'Budget Preparation' menu is expanded, showing 'Entry & Processing' and 'Reports'. The 'Reports' menu is further expanded, showing various report categories: 5-Year Expenditure Projection, 5-Year Project, 5-Year Revenue, Expenditure, and Revenue. The 'Requested Worksheet' option is highlighted under the 'Expenditure' category. A black arrow points from the 'Budget Preparation' menu to the 'Reports' menu, and another black arrow points from the 'Reports' menu to the 'Requested Worksheet' option. A black circle highlights the 'Requested Worksheet' option.

BUDGET ENTRY

Print Worksheet

(cont.)

The “Expenditure Worksheet” window will appear on your screen. Enter “2000” in the **Fund** box. (Belle Point should enter “2275”.) Select the **OK** button to process your request.

Select **Department Expenditure Budget** as the Report Type. Select the **OK** button to process your request. Print the report to your screen before printing to hard copy.

The screenshot shows the 'Expenditure Worksheet - FT SMITH PUBLIC SCHOOLS (LIVE!!)' interface. The 'Account' section is highlighted with a red oval, showing 'FUND' set to '2000 - OPERATING FUND'. The 'Report Type' section is also highlighted with a red oval, showing 'Department Expenditure Budget' selected. The 'Options For Printing Notes' section has 'Do Not Print Notes' selected. The interface includes a search bar, a toolbar, and a footer with version information and contact details.

1. Print two copies of the Departmental Budget Worksheet.
2. Keep one copy for yourself and give one **signed** copy to Bryan (Business Office).
3. Once you have submitted your Departmental Budget Worksheet to Bryan, **please do not make any changes to your budget.** If you need a change made, contact Bryan immediately.