

## WCU 2019-20 UNIVERSITY BUDGET REQUEST INSTRUCTIONS & PROCESS

All budget request information is available at the budget process website, located at <http://budgetprocess.wcu.edu>.

### Process:

- The university is continuing to use the online budget request form for the 2019-20 budget process. The form can be found at the following link: <https://services.my.wcu.edu/sites/BudgetRequest/Lists/Budget%20Requests/NewForm.aspx?Source=https://secure.mytest.wcu.edu/budgetprocess/Lists/Budget%20Requests/AllItems.aspx?PageView=Shared&InitialTabId=Ribbon.WebPartPage&VisibilityContext=WSSWebPartPage&RootFolder=>. This link is also available on the budget process website.
- **Requests:** Budget requests will align with the 20/20 Vision and other selected criteria.
  - **Non-Recurring Budget Requests**– Requests for one-time allocations should adhere to state spending guidelines. A unit may seek and receive bids in anticipation of the *possible* release of one -time monies. Goods or services that cost greater than \$5,000 will require bids which must go through the WCU Purchasing Department. The act of seeking and receiving bids does not obligate WCU to purchase that good or service. Be prepared to issue purchase orders based on bids, in case WCU is in a position to purchase before June 30, 2020.
  - **Recurring Requests**– Recurring requests should be classified as either “Recurring – Personnel” or “Recurring – Non-Personnel”. When submitting a recurring request, you must also identify if an associated non-recurring request (such as position start-up) exists. Please note – you will not have to create a separate non-recurring request for these items. The system will create one for you based on the information you provide in the section of the form highlighted below:

*For Recurring Requests Only:*

Is there an associated non-recurring cost?  Non-recurring cost:  Please prioritize this non-recurring request:

Please enter the title of the associated non-recurring request

Please note: if there is an associated non-recurring cost, you **do not** need to submit a separate non-recurring request. A request will be created for you based on the information entered above.

- **University-wide Initiatives**– The university-wide category no longer exists. Requesters must use one of the categories described above.
- **Saving Budget Requests:** Requestors can either save requests as a draft or submit the request to their division’s list of requests (or college’s list of requests, for Academic Affairs). When an item is saved as a draft, it remains in draft status until submitted for consideration. Drafts do not appear in division request lists. The requestor will receive a link to their draft via email. The link is also available on the main request page (<https://services.my.wcu.edu/sites/BudgetRequest>).

### Draft Budget Request - Review, Edit and Publish

Draft Budget Request

[Link to Draft Report](#)

There are no items to show in this view of the "BudgetRequestTasks" list. To add a new item, click "New".

- **AutoSave Requests:** If a requestor is in the process of working on a new request and form/page times out (security feature), the information will be AutoSaved. AutoSaved requests are stored in a separate section. The requestor will need to open the AutoSaved copy and save as a draft or submit to the division/college for prioritization (at which time a title will be attached to the request.)

**Autosaved in Progress - Not Draft or Published**

Created By	Request Title	Edit
<input type="checkbox"/> ladybird@wcu.edu	New Request	

- **Prioritization:** The requestor (requests should originate at the college/unit level) is able to prioritize within the budget request form. Once submitted, the data transfers to the division list for further review and prioritization. Division level prioritization happens within this list. Division level users can switch the list into prioritization mode using the link labeled “View & Select Prioritizations” (see below).

View & Select Prioritizations

Submit New Budget Request

Division Priority Category	Division Priority	College/Unit Priority	Request Title	Dept Desc	Cost	Link to Strategic Initiative	Increase Enrollme
There are no items to show in this view of the "Chancellor's Division Budget Requests" list. To add a new item, click "New".							

The links switches the list to a spreadsheet, making data entry possible without having to open each individual item. Division leadership should complete the “Division Priority Category” (high, medium, low) as well as the “Division Priority” (numeric rating) column.

- **Security and Access:** Any person with WCU credentials can view budget requests and their ranking. Only college/unit/division level managers and business officers will be able to input and prioritize budget requests.

#### Timeline:

- The budget request timeline is as follows:
  - Non-recurring requests must be submitted and prioritized by division leadership by January 10, 2019.
  - Recurring requests submitted and division budget hearings end on March 29<sup>th</sup>
    - Divisions have flexibility to hold hearings in the fall, spring, or both.
    - Each division should formulate a budget hearing strategy and communicate that information to department leadership. As meetings are scheduled, please send the budget office the time and location for publication on the budget process website.
  - University wide budget hearing will be held on April 4<sup>th</sup>.
  - The joint CLC-BAC meeting will be held on April 23<sup>rd</sup>.

#### Support:

- Please contact Alison Joseph at [ajoseph@wcu.edu](mailto:ajoseph@wcu.edu) or extension 3042 if you have questions or need assistance.