

# Instructions for Budget Request Submission

## Budget Request Home Page

General information about the annual Budget process can be located on the Budget Office's website: [Budget Process Website](#)

This site includes the annual budget process timeline, instructions, and listings for division budget hearings/presentations (which will be updated overtime as they are scheduled/developed).

The Budget Request homepage can be located here: [Budget Request](#)

This site requires a login and can be accessed by all university employees.

## Submitting a Budget Request

To submit a request, click on the purple "New Budget Request" button. By submitting a request, you are attesting that you are authorized to submit the request on behalf of your department.

Please fill out the request form completely. Most fields are required, as indicated by an asterisk.

There is some variance in fields, depending on the selections around type (recurring or non-recurring) and category. Recurring requests for new faculty, new staff, and operating increases will allow the user to also indicate if there are any one-time/start-up costs. Those include moving costs, initial software implementation/training, or one-time equipment purchase, for example. Recurring requests for new faculty and new staff also allow for a requested increase in recurring/operating funds, such as those needed to support professional development, periodic laptop replacement, and supplies, for example.

<b>Are there recurring/operational funds?</b> <input checked="" type="radio"/> Yes <input type="radio"/> No  <i>e.g., Professional Development</i>	<b>Is there a one time/start up cost?</b> <input checked="" type="radio"/> Yes <input type="radio"/> No  <i>e.g., Software Implementation or Moving Costs</i>	
<b>* Requested Amount</b> <input type="text"/>	<b>* Recurring/Operational Amount</b> <input type="text"/> <b>If there are operational funds, an amount is required.</b>	<b>* One time/Start up Amount</b> <input type="text"/> <b>If there is a one time cost, an amount is required.</b>
<b>* Do not include benefits.</b> <b>* Benefits will be added to reflect full cost of compensation (typically between 25-35%).</b>		

On the form users will encounter two drop down selections (for quantifiable benefits and strategic plan linkage). In both cases users may select all that apply by simply clicking on all applicable choices. When selection is finalized, simply click anywhere else on the form to move on to the next field.

Choose one or more Strategic Initiative and corresponding Goal.  
 \*Select more than one by clicking on each item. When done, click on form but outside of field.

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Academic Excellence -- 1.1: Deliver high-quality academic programs.

Academic Excellence -- 1.2: Integrate into the liberal studies program core abilities expected of all students.

Academic Excellence -- 1.3: Embed and support realization of WCU's areas of distinction.

At the end of the form, users will preview all entries on a single preview view. Users can select to save to draft if additional editing is needed or submit if the request is complete.

**Viewing University Requests (drafts, this year, and last year)**

Links to all requests (draft, submitted this year, and submitted last year) are all available on the budget request home page: [Budget Request](#)

The screenshot shows a web interface for budget requests. At the top, there is a section titled 'My Draft Requests' with a 'See all' link. Below this are three dropdown menus for 'Title', 'Status', and 'ViewItem'. The main section is 'View and Prioritize 2023-24 Requests', which contains a grid of eight request categories, each with an icon and a label: Chancellor's Division, Academic Affairs, College/Unit Planning Pages, Administration & Finance, Advancement, Athletics, Information Technology, and Student Affairs. Below the grid is a section for 'View All 2022-23 Archived Requests' with a checked checkbox and the text 'Academic & Administrative - Recurring & Non-Recurring'. Blue brackets on the right side of the image group the 'My Draft Requests' section as 'Draft' and the grid of categories as 'Current and Prior Year'.

**Canceling or Changing a Submitted Request**

To cancel or change a submitted request, contact Morgan Burnett in the Controller's Office (x3793, [cmburnett@wcu.edu](mailto:cmburnett@wcu.edu)).

**Submitting a Facilities Planning Request**

The Budget Request site now includes a form for Facilities Planning Requests. Facilities requests are not considered budget requests and are not prioritized alongside other requests. This form is only a mechanism for gathering information about potential building/space needs in a routine and annual way, so that those requests can be considered in capital planning and budgeting processes at the campus and state level.