BUDGET WORKSHOP
Fiscal Year 2016
9:15am
Purpose for this workshop:

Prepare for Fiscal Year 2016
Discuss Academic Affairs Document Routing
Discuss Monitoring Account Balances
Discuss Preparation of Transfers Worksheets
Discuss Routing DBRs
Discuss Tracking documents
Changes!

- Good
- Bad
- Indifferent

change is in the air.
CROSS YOUR ARMS!
Preparing for FY2016

- Expectations
- Problems
- Ideas
Academic Affairs
Document Routing

• Why?
• Processing Time?
• The Process?
• Bottleneck?
BREAK – 15 MINUTES

Take 5!

10:30am
CHANGE YOUR SEAT
Monitoring Account Balances

• Account Review
• Clearing Deficits
• Old accounts
  • Unable to clear
  • Submit a Academic Affairs Fund Request to Academic Affairs
• Periodic Account Review
Academic Transfer Worksheet

• Purpose
• Steps to Complete
• Supporting Documents
Routing DBR’s

• Payroll Related
  • Academic Transfer Worksheet
  • Supporting Documents
  • Footed Correctly

• Maintenance and Operations

• Detail description
Tracking Documents

• Payroll related
  • Track to completion
  • Set Canopy to be notified of rejects
  • Accountability