

FY20 EWU S&A Budget Submission for Departments/Programs/Units EagleSync Instructions



1. Please complete the “S & A Funding Request Documentation” **First** by going to the link below. Once you have clicked on the link below, you will need to login with your ID.

<https://orgsync.com/130361/forms/346959>

Once you have done this, you will be directed to the document below:

S&A Funding Request Documentation

The EWU Student Activity Fee (S&A Fee) supports student-centered activities, services, facilities, and recreation to improve student life. To apply for funding derived from the EWU Student Activity Fee, EWU departments/units/program and Clubs & Organizations (C&Os) are required to submit a budget on EagleSync (see step-by-step directions provided separately) that outlines salaries/wages, benefits, and/or direct expense funds being requested. As part of developing a budget request, you will be asked to upload supporting documentation (this form). Please make sure that you fully complete this form, save it as a PDF at the end, and then upload it as part of the budget you submit.

Scroll to the bottom of the page and click the green box that says “Begin Form”



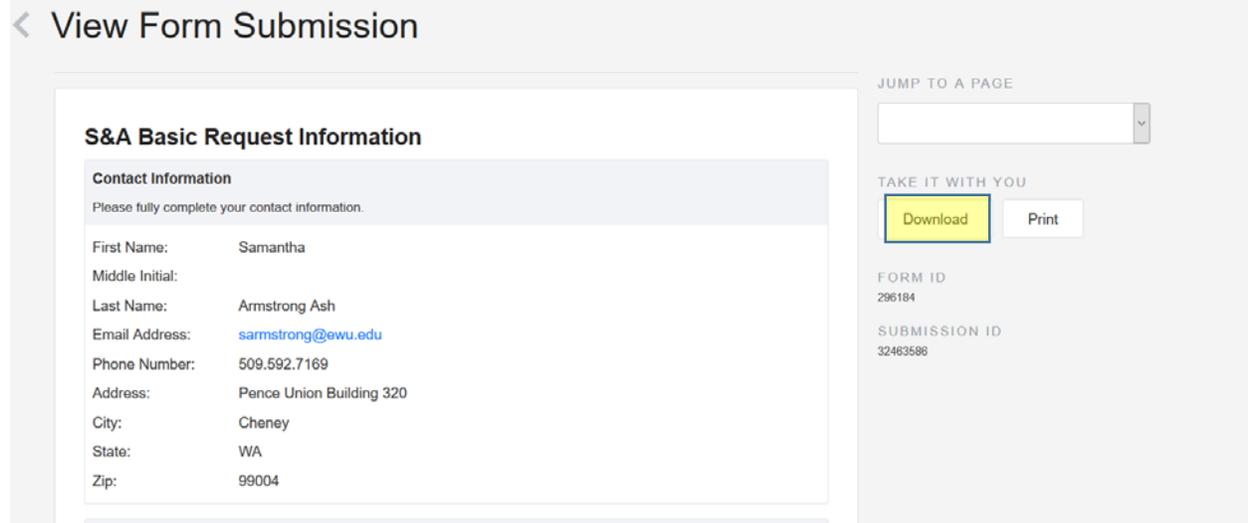
2. Once you complete the form and hit submit, scroll down to the bottom. You will see your submission. Select View submission. (Please note that this form will need to be completed on order to print and finish your budget submission)

YOUR SUBMISSIONS

Start Date	Last Updated	
Dec 05, 2017, 10:24PM PST	Dec 05, 2017, 11:06PM PST	View Submission



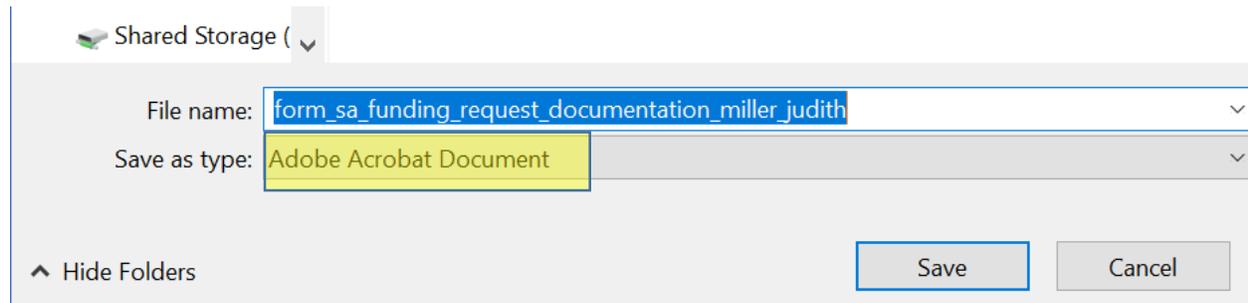
You will now see your “View Form Submission” (below) Once you see this, you can click on the “Download” button.



Now you will want to click the arrow button next to the Save button and select “SAVE AS”



Once you have done that you will get the option below, and you will want to be sure and save as an “Adobe Acrobat Document” in your file where you can easily find it to Upload at the end of the budget process. Now click SAVE.



3. You are now ready to Go to your Eagle Sync Portal, click on the “More” tab and Select Treasury to start your Budget Request.

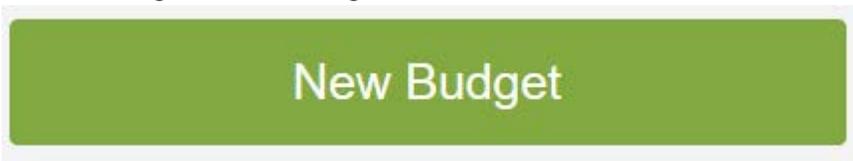


4. Once on the Treasury Page select "Manage Budgets"

Treasury

Budgets	Revenue Funds
 Manage budgeting and activity funding, including submitting a budget request.	 See a rolling balance of funds available for your organization, create entries, and view requests.
Manage Budgets	Manage Revenue Funds

5. Click on the green "New Budget" button.



6. You will now receive this screen introducing you to the process with current year information and deadline dates and times.

S&A BUDGET FUNDING REQUESTS | REVIEW CAREFULLY

If you have any questions or concerns regarding this form or the S&A Funding Process, please contact Alicia Decker at asewudirfinance@ewu.edu or Samantha Armstrong Ash at sarmstrong@ewu.edu

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Once you have completed the supporting documentation and saved it as PDF, select the budget that matches the request you would like to make. It is critical that you select the correct budget form. Your options are:

FY 20 (July 2019-June 30, 2020)

FY 19 Supplemental Budget Request (January 2019 to June 2019)

FY 2019 (July 2018 to June 2019) *Do not select FY2019 (July 2018 to June 2019). *We have already awarded all funding for this budget period.

7. You will now begin the process. Your Budget title will read as below:

Budget Title

Dept Name (e.g. Student Accounting) S & A 2019-2020 Budget Request (300087)

8. The Budget Period You will select from the drop down arrow is: **FY20 July 2019 to June 30 2020**



9. Budget Details you will insert your Item Title using **"Wages and Benefits"** as your first title if you have payroll for your Dept. If you do not have Payroll, your item title will be **"Direct Expense"**. (Please keep in mind that if you have both Wages and Benefits and Direct Expense, you will be doing this twice.)

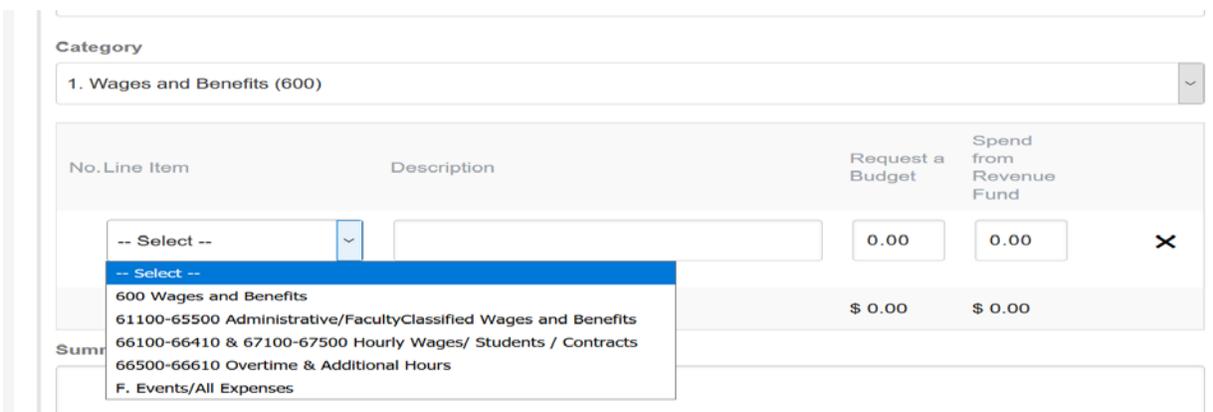
BUDGET ITEM



Item Title

Wages and Benefits

10. Your next section is Category, and you will click on the drop down arrow and select the category that matches your "Item Title" that you just submitted. All Departments will **NOT** be using the "Clubs and Organizations" category.



11. If your first title is **"Wages and Benefits"** your next step will give you the option to request your budget by payroll categories. (if your first title is "Direct Expense" skip to 9b.) You will see from the drop down arrow that you can categorize them and create separate line items with budget dollar amounts by using the **"Add Line Item"** for each category. At this point I would ask you to do the "add line item" for each payroll category listed, even if you do not budget for it. Please

be aware that you DO NOT budget in these categories for any pay increases. That will be done in The “Direct Expense” Category below by using a separate line item for your anticipated increases. You will not be using the “Revenue Fund Box” for Departments.

Budget Details

BUDGET ITEM ✕

Item Title
Wages and Benefits

Category
1. Wages and Benefits (600) ▼

No. Line Item	Description	Request a Budget	Spend from Revenue Fund	
-- Select -- ▼		0.00	0.00	✕
-- Select --		\$ 0.00	\$ 0.00	
600 Wages and Benefits				
61100-65500 Administrative/FacultyClassified Wages and Benefits				
66100-66410 & 67100-67500 Hourly Wages/ Students / Contracts				
66500-66610 Overtime & Additional Hours				
F. Events/All Expenses				

Sumr

+ Add Line Item \$ 0.00 \$ 0.00

If you will be completing a Direct Expense Budget also, you will now select “Add Budget Item” and continue on to step 9b. to request your direct Expense budget.

Add Budget Item

9b. If your Item Title and Category is “Direct Expense”, you will see these drop down options below. You can now categorize your budget expense using these categories and creating a separate item by using the “+Add Line Item” for each category you budget for. At this point I would ask you to do the “add line item” for each expense category listed, even if you do not budget for it. This is where you will find the category “Salary Allocations for Increases & Adjustments” to budget for your payroll increases anticipated. In this category you will NOT be using the Item listed as “F. Events/All Expenses”. This is for the clubs to use in their budget process. You will NOT be using the “Revenue Fund Box” for Departments.

	Budget	Revenue Fund
-- Select --	0.00	0.00
<ul style="list-style-type: none"> -- Select -- 700 Direct Expense 700 Salary Allocations for Increases and Adjustments 71100-71110 Personal Services,(IT Serv., Comm. Serv.,Emp Train Serv., Other) 71200-71220 Contractual Services (Contract Serv., Purchased Serv., Direct Payment to Provider) 71300-71360 Utilities 71400-71404 Supplies & Materials 71410-71412 Printing Charges 71420-71422 Communications (Telephone, Misc Comm., Postage) 71430-71433 Rentals & Leases 71440-71445 Repairs (Building, Equipment, Vehicles , Auto Shop) 71446-71452 Other (Gas, Fuel Farm, Dues, Memberships, Conf Fees., Insurance, PR,Misc Other, Software, Small &Attractive) 71710-71850 Travel (Lodging, Airfare, Mileage, Other Travel, Moving, Meals, Light Refresh., Motor Pool 72010-72032 Equipment Capital/Equipment Library F. Events/All Expenses 		
Grand Total Requested:		\$ 0.00

12. At this point you will now have your budget requests entered. Your next step is to Upload your documents. You can do so by clicking on the **“Upload”** here. This is where you will bring in your “S & A Funding Request Documentation” that you completed at the beginning of the process.

Upload Documents

If you need to upload scanned or electronic documents, you can do so here. Max file size is 10 MB.

There are no uploads for this request.

Upload

13. Once you have uploaded your documents you are ready to **“SUBMIT”** your Budget Request.