

# Annual Operating Budget Planning Anaplan VP Area and VP Approver User Guide

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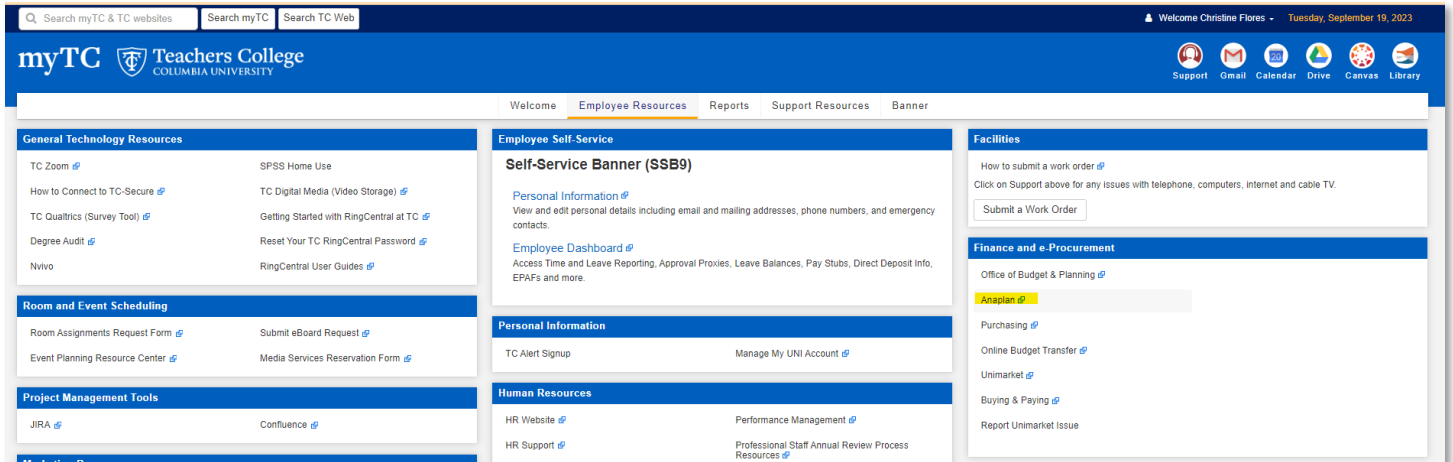
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## Accessing Anaplan

1. Log onto the [TC Portal](#)
2. Navigate to the Employee Resources tab
3. Navigate to the Finance and e-Procurement portlet. The Anaplan homepage will be the second link.

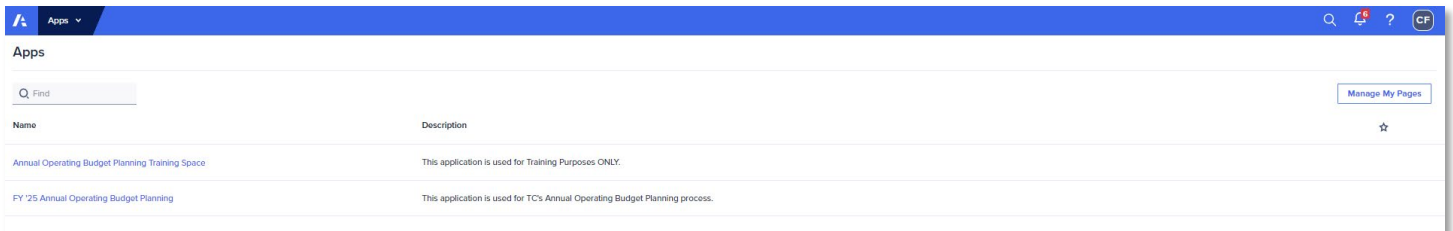


The screenshot shows the myTC portal interface. At the top, there are search bars and a navigation menu with tabs: Welcome, Employee Resources (selected), Reports, Support Resources, and Banner. Below the navigation, there are several portlets:

- General Technology Resources:** Includes links for TC Zoom, SPSS Home Use, How to Connect to TC-Secure, TC Digital Media (Video Storage), TC Qualtrics (Survey Tool), Getting Started with RingCentral at TC, Degree Audit, Reset Your TC RingCentral Password, and Nvivo, RingCentral User Guides.
- Room and Event Scheduling:** Includes links for Room Assignments Request Form, Submit eBoard Request, Event Planning Resource Center, and Media Services Reservation Form.
- Project Management Tools:** Includes links for JIRA and Confluence.
- Employee Self-Service:** Features a **Self-Service Banner (SSB9)** with sections for Personal Information (View and edit personal details), Employee Dashboard (Access Time and Leave Reporting, Approval Proxies, Leave Balances, Pay Stubs, Direct Deposit Info, EPAFs and more), Personal Information (TC Alert Signup, Manage My UNI Account), and Human Resources (HR Website, Performance Management, HR Support, Professional Staff Annual Review Process Resources).
- Facilities:** Includes a link for How to submit a work order and a Submit a Work Order button.
- Finance and e-Procurement:** Includes links for Office of Budget & Planning, Anaplan (highlighted), Purchasing, Online Budget Transfer, Unimarket, Buying & Paying, and Report Unimarket Issue.

This will take you to Anaplan’s applications home page. There should be two applications:

1. Annual Operating Budget Planning Training Space - This application is used for Training Purposes ONLY.
2. FY'XX Annual Operating Budget Planning - This application is used for TC's Annual Operating Budget Planning process. This application will not be available outside of the cycle timeline.



The screenshot shows the Anaplan applications home page. It features a search bar and a table of applications:

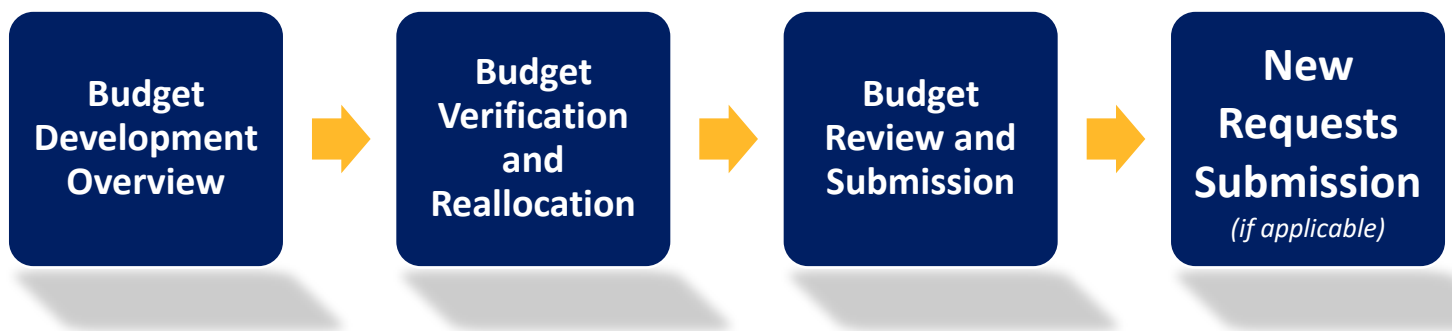
Name	Description
Annual Operating Budget Planning Training Space	This application is used for Training Purposes ONLY.
FY '25 Annual Operating Budget Planning	This application is used for TC's Annual Operating Budget Planning process.

Selecting any one of these applications will take you to the application’s content page. The content page contains the dashboards used for the Annual Operating Budget Planning process, grouped by category.

## Anaplan Operating Budget Planning Process Workflow

The first category, Overview of the Annual Budget Planning Process, contains a dashboard of the Teacher's College welcome message and general instructions for completing the annual budget planning process. This section provides resources for completing the process, identifies your model user role, highlights the cycle deadline and provides an overview of the steps that need to be taken to complete the annual operating budget planning process.

Use the **Overview of the Annual Budget Planning Process page** to help guide you through the steps for completing the annual operating budget planning process.



### ***Operating Budget Development Overview***

This category contains the pages used to review the timeline and completion status of the budget planning process and summaries of the budget reallocations made.

### ***Operating Budget Verification and Reallocation***

This category contains the pages used to verify and reallocate the fiscal year Full Time & Union, Part Time and OTPS budgets for the department(s) you are responsible for.

### ***Operating Budget Adjustments***

This category contains the pages used to create and submit departmental budget adjustments. These pages can be used as an alternative to the budget verification and reallocation pages.

### ***Operating Budget Review & Submissions***

This category contains the page used to do a final review of the Requested Budget, ensuring all reallocations net to zero or less, and to submit the budget to the next approval level.

### ***New Operating Budget Requests***

This category contains the pages used to submit requests for incremental increases to your base budget.

### ***Reporting***

This category provides useful reports summarizing the planned fiscal year budget data to assist in the review process.

## Operating Budget Development Overview

### 1.0 Budget Development Status Dashboard

This dashboard provides the timeline and completion status of the budget planning at each step of the process.

The **Key Activities** and **Budget Timeline** cards display the budget submission deadline in both date and Gantt chart format.

Key Activities		
	From	To
Budget Submission Deadline	10/2/23	11/3/23



The **Budget Development Status by Index** table displays:

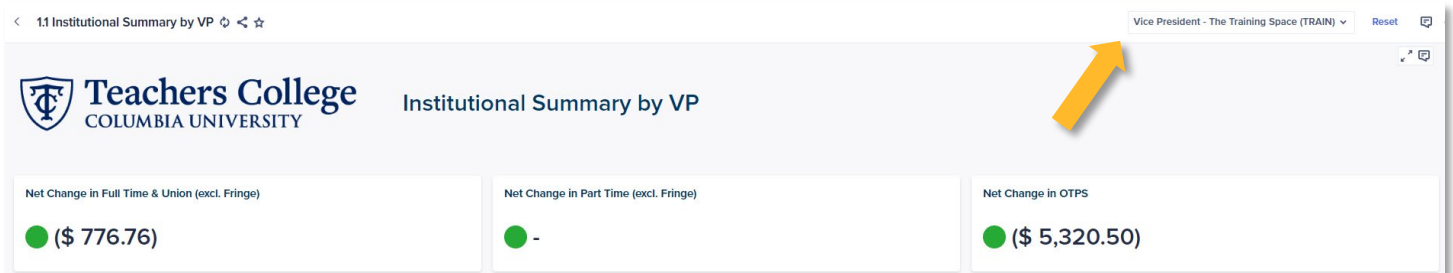
- The overall Completion Status of the process
- The workflow submission statuses for the Requested Base Budget by Program Approval, Department Approval, VP Area Review, VP Approval, and Budget Office Approval.
- The status of Approved New Budget Requests

Budget Development Status by Index						
	Completion Status	Program Approval	Department Approval	VP Approval	Budget Office Approval	Approved New Budget Requests
Lions						-
Manhattan Lions						-
ML1111 - Administration	Under Review	Program Manager Approved	Department Manager Approved	Not Submitted	Not Submitted	-
ML2222 - Programs	Under Review	Program Manager Approved	Department Manager Approved	Available for Review	Not Submitted	-
Big Apple Lions						-
BA3333 - Operations	Under Review	Program Manager Approved	Available for Review	Not Submitted	Not Submitted	-
Columbia Blue						-
Knickerbocker Blue						-
KB4444 - General	Under Review	Program Manager Approved	Available for Review	Not Submitted	Not Submitted	-
Tiffany Blue						-
TB5555 - Silver and Bling	Under Review	Program Manager Approved	Available for Review	Not Submitted	Not Submitted	-

## 1.1 Institutional Summary by VP

This dashboard displays metrics for net changes between the Preliminary Budget and the Requested Budget for Full Time & Union, Part Time and OTPS reallocations. *The metrics do not include fringe in the calculation.* The dot will turn red if net reallocations are greater than zero and green if net reallocations are zero or less.

Use the context selector at the top right-hand corner of the dashboard to change the display information based on the selected VP area or Department.



This dashboard also provides table summaries of the changes in Full Time & Union, Part Time and OTPS planning categories by VP area, Department, Program and Index and Account.

The summary includes:

- Actuals for the preceding three fiscal years
- Current fiscal year's Approved Budget
- Planning year's Preliminary Budget
- Change in Full Time & Union reflecting total reallocations for Full Time & Union planning made at all approval levels.
- Change in Part Time reflecting total reallocations in Part Time planning made at all approval levels.
- Change in OTPS reflecting total reallocations in OTPS planning made at all approval levels.
- Change in Fringe
- Total All Changes calculated as the total of all change columns.
- Adjusted Requested Base Budget is the Preliminary Budget + Change in Full Time & Union + Change in Part Time + Change in OTPS + Change in Fringe
- New Budget Requests are the approved amounts from the New Budget Requests process
- Approved Budget reflects the final fiscal year planning budget approved by the Office of Budget and Planning. It is calculated as the Adjusted Requested Base Budget + New Budget Requests + any central Budget Office adjustments.

VP Summary by Department

	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Change in Full Time & Union	Change in Part Time	Change in OTPS	Change in Fringe	Total All Changes	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	FY '24 Approved Budget
Lions	1,608,894.79	1,633,006.71	1,329,815.80	1,515,934.23	1,962,753.43	(776.75)	-	(5,320.50)	6,825.52	728.27	1,963,481.70	-	-
Columbia Blue	847,376.54	883,215.57	880,975.85	904,749.96	930,630.22	-	-	-	19,107.18	19,107.18	949,737.40	-	-
Vice President - The Training Space (TRAIN)	2,456,271.33	2,516,222.28	2,210,791.65	2,420,684.19	2,893,383.65	(776.75)	-	(5,320.50)	25,932.70	19,835.45	2,913,219.10	-	-

Vice President - The Training Space (TRAIN) v

Department Summary by Program

	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Change in Full Time & Union	Change in Part Time	Change in OTPS	Change in Fringe	Total All Changes	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	FY '24 Approved Budget
Manhattan Lions	824,456.32	828,564.52	511,347.47	558,364.35	986,255.16	(776.75)	-	-	(17,470.80)	(18,247.55)	968,007.61	-	-
Big Apple Lions	784,438.47	804,442.19	818,468.33	957,569.88	976,498.27	-	-	(5,320.50)	24,296.32	18,975.82	995,474.09	-	-
Knickerbocker Blue	372,547.10	408,142.64	391,419.91	445,000.47	494,277.00	-	-	-	19,816.79	19,816.79	514,093.79	-	-
Tiffany Blue	474,829.44	475,072.93	489,555.94	459,749.49	436,353.22	-	-	-	(709.61)	(709.61)	435,643.61	-	-

Vice President - The Training Space (TRAIN) v

## 1.2 Budget Summary – Reallocations in Aggregate

This dashboard also displays the metrics for net changes between the Preliminary Budget and the Requested Budget for Full Time & Union, Part Time and OTPS reallocations. It also summarizes by Account Category the inputted budget reallocations by Index and Program level, Department level, and VP level.

Use the context selector at the top right-hand corner of the dashboard to change the display information based on the selected VP area all the way down to the index.

1. Budget Development Overview / 1.1 Budget Summary - Reallocations in Aggregate (Index) v

ML1111 - Administration v Reset

Teachers College COLUMBIA UNIVERSITY Budget Planning Summary - Reallocations in Aggregate

Net Change in Full Time & Union (excl. Fringe) ● (\$ 35,260.00)

Net Change in Part Time (excl. Fringe) ● \$ 12,000.00

Net Change in OTPS ● -

[Submission Page >](#)

The **Budget Summary** card summarizes by Account Category the inputted budget reallocations by Index and Program level, Department level, and VP level:

- Reallocation (\$) reflects changes made in the Full Time & Union, Part Time and OTPS planning screens
- Departmental Adjustments reflect reallocations made at the Department level via the Budget Adjustment Form, including changes in fringe

- VP Adjustments reflect reallocations made at the VP level via the Budget Adjustment Form, including changes in fringe

Budget Summary											
	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation (\$)	FY '24 Departmental Adjustments	FY '24 VP Adjustments	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	FY '24 Approved Budget
Instructional Salaries	71,047.00	77,898.96	69,850.94	68,377.23	68,499.23	(23,260.00)	-	-	45,239.23	-	-
Staff Salaries	78,859.23	101,521.01	103,616.59	105,230.00	104,745.00	-	-	-	104,745.00	-	-
Student Employment	1,154.00	520.00	2,181.00	4,581.01	4,581.01	-	-	-	4,581.01	-	-
Benefits Expense	55,540.87	64,220.91	65,200.25	67,491.80	67,491.80	(5,622.62)	-	-	61,869.18	-	-
Professional & Contracted Services	2,050.00	779.00	5,647.00	5,625.69	5,625.69	-	-	-	5,625.69	-	-
Technology Support	536.28	233.00	652.91	787.00	787.00	-	-	-	787.00	-	-
All Other OTPS	3,049.00	4,845.00	4,048.00	5,098.82	5,098.82	-	-	-	5,098.82	-	-
Expenses	212,236.38	250,017.88	251,196.69	257,191.55	256,828.55	(28,882.62)	-	-	227,945.93	-	-

If you are looking at the **Budget Summary** at the VP level, the lower **Reallocation Changes by Index** card will provide details of the selected Account Category reallocations by index.

Budget Summary											
	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation (\$)	FY '24 Departmental Adjustments	FY '24 VP Adjustments	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	FY '24 Approved Budget
Instructional Salaries	71,047.00	77,898.96	69,850.94	68,377.23	68,499.23	(5,000.00)	-	-	63,499.23	-	-
Staff Salaries	492,658.75	488,924.91	254,537.87	256,059.29	189,621.10	57,821.70	-	-	247,442.80	-	-
Student Employment	1,154.00	520.00	2,181.00	4,581.01	4,581.01	-	-	-	4,581.01	-	-
Benefits Expense	204,195.02	202,633.92	122,455.96	123,357.31	123,357.31	4,504.57	-	-	127,861.88	-	-
Scholarship & Financial Aid	1,734.00	1,527.00	1,877.00	26,126.00	522,520.00	-	-	-	522,520.00	-	-
Professional & Contracted Services	16,099.83	7,144.31	19,906.00	41,232.69	41,232.69	-	-	-	41,232.69	-	-
Space & Facilities Operations	2,613.00	1,498.00	2,633.00	3,161.00	3,161.00	-	-	-	3,161.00	-	-
Technology Support	5,583.08	9,241.20	4,521.90	3,265.00	3,265.00	-	-	-	3,265.00	-	-
All Other OTPS	29,017.64	36,599.22	33,106.80	29,477.82	29,477.82	(1,607.00)	-	-	27,870.82	-	-
Debt Service and Finance Charges	354.00	2,577.00	277.00	540.00	540.00	-	-	-	540.00	-	-
Expenses	824,456.32	828,564.52	511,347.47	558,364.35	986,255.16	55,719.27	-	-	1,041,974.43	-	-

Reallocation Changes by Index											
	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation (\$)	FY '24 Departmental Adjustments	FY '24 VP Adjustments	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	FY '24 Approved Budget
ML1111 - Administration	78,859.23	101,521.01	103,616.59	105,230.00	104,745.00	3,000.00	-	-	107,745.00	-	-
ML2222 - Programs	413,799.52	387,403.90	150,921.28	150,829.29	84,876.10	54,821.70	-	-	139,697.80	-	-

### 1.3 Budget Summary – Reallocations by Type

This dashboard is similar to the Reallocations in Aggregate dashboard, with a few changes to the **Budget Summary**. Instead of reallocations by approval level, reallocations are summarized by planning section, similar to the summary tables in 1.1.



Budget Summary

	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Change in Full Time & Union	Change in Part Time	Change in OTPS	Change in Fringe	Total All Changes	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	FY '24 Approved Budget
Full Time Faculty	35,096.92	35,119.92	35,303.92	35,138.00	35,260.00	(35,260.00)	-	-	-	(35,260.00)	-	-	-
Part Time Instructional Staff	35,950.08	42,779.04	34,547.02	33,239.23	33,239.23	-	1,000.00	-	-	1,000.00	34,239.23	-	-
Instructional Salaries	71,047.00	77,898.96	69,850.94	68,377.23	68,499.23	(35,260.00)	1,000.00	-	-	(34,260.00)	34,239.23	-	-
Full Time Professional & Support Staff	979,486.26	983,926.41	687,787.37	773,655.47	723,862.10	34,483.25	-	-	-	34,483.25	758,345.35	-	-
Overtime	1,615.00	1,066.00	632.00	649.71	682.20	-	2,000.00	5,320.50	-	7,320.50	8,002.70	-	-
Part Time Professional & Support Staff	69,056.50	70,947.04	51,041.95	80,890.17	83,141.25	-	(3,000.00)	-	-	(3,000.00)	80,141.25	-	-
Staff Salaries	1,050,157.76	1,055,939.45	739,461.32	855,195.35	807,685.55	34,483.25	(1,000.00)	5,320.50	-	38,803.75	846,489.30	-	-
Student Employment	1,154.00	520.00	2,181.00	4,581.01	4,581.01	-	-	-	-	-	4,581.01	-	-
Student Employment	1,154.00	520.00	2,181.00	4,581.01	4,581.01	-	-	-	-	-	4,581.01	-	-
Fringe Benefits	403,873.81	405,953.52	342,654.79	352,467.41	352,467.41	-	-	-	6,825.52	6,825.52	359,292.93	-	-
Benefits Expense	403,873.81	405,953.52	342,654.79	352,467.41	352,467.41	-	-	-	6,825.52	6,825.52	359,292.93	-	-
Scholarship & Aid	1,734.00	1,527.00	1,877.00	26,126.00	522,520.00	-	-	-	-	-	522,520.00	-	-
Scholarship & Financial Aid	1,734.00	1,527.00	1,877.00	26,126.00	522,520.00	-	-	-	-	-	522,520.00	-	-
Consulting Services	6,358.00	3,609.00	102,250.06	113,586.10	113,586.10	-	-	-	-	-	113,586.10	-	-

Lions

## Operating Budget Verification and Reallocation

These planning pages are used by the Index Input Users, Program and Department Approvers to input changes to the requested budget.

### 2.0 Full Time & Union Position Budget

This dashboard is used to develop the Requested Budget for all Full Time & Union positions charged to the departments you manage. If a Department Approver has submitted the budget to you, use this page to make any necessary changes or [return the budget for correction](#) for the Department Approver to make the corrections.

There are five overall Full Time & Union planning metrics provided:

- Net Change in Full Time & Union (excl. Fringe)** - If this amount represents net reallocations at zero or less, the dot will turn green. Otherwise, it will be red.
- Planned Operating Headcount** – All Full-Time positions permanently charged to the operating budget, excluding all supplemental positions
- Requested Position Budget** – This metric shows the total requested position budget.
- Budgeted to Other Operating** – Total budget of positions you own that are split funded with other operating indices
- Budgeted to Non-Operating** – Total budget of positions you own that are split funded with other non-operating indices

Net Change in Full Time & Union (excl. Fringe)	Planned Operating Headcount	Requested Position Budget	Budgeted to Other Operating	Budgeted to Non-Operating
<span style="color: green;">●</span> -	68.00	6,156,871.33	-	-

Positions charged to your index(es) are listed in two sections:

- Home Positions** – these are positions charged to your index that you own and can therefore make budget changes to.
- Charged Positions** – these are split funded positions partially charged to your index that are owned by another index. You will need to contact the position’s Home Index manager to make reallocations to the budget.

The Home Index for a position is defaulted to the index with the highest allocation. In scenarios with 50% 50% split funding, the Home Index will default to the first in numerical order.

### Home Positions

HOME POSITIONS							
	Incumbent	Index Preliminary Budget	Index Requested Budget	LD %	Distribution Status	Planned Operating Headcount	Comments
BA3333 - Operations		614,662.00	614,662.00			0	
BA3333_PL6000 - FT Salary Pool		214.00	214.00	100.0%	Fully Distributed	0	
PO2017 - Program Coordinator	Rix, Johnny	65,016.00	65,016.00	100.0%	Fully Distributed	1	
PO2026 - Assistant Director	Hall, Tony	74,587.00	74,587.00	100.0%	Fully Distributed	1	
PO2045 - Assistant Director	Alberti, Eva Allen	70,184.00	70,184.00	100.0%	Fully Distributed	1	
PO2049 - Director	Booker, James	90,200.00	90,200.00	100.0%	Fully Distributed	1	
PO2089 - Associate Director	Thomas, Ima	85,679.00	85,679.00	100.0%	Fully Distributed	1	
PO2091 - Assistant Director	Domino, Fats	81,863.00	81,863.00	100.0%	Fully Distributed	1	
PO6028 - Analyst	Tholt, Sammy	59,803.00	59,803.00	100.0%	Fully Distributed	1	
PO6031 - Part-Time Secretarial/Clerical	Vacant - Dodge, Grace Hoadley	35,132.00	35,132.00	100.0%	Fully Distributed	0	
PO6035 - Custodian II	Vacant - Vanderbilt, William	51,984.00	51,984.00	100.0%	Fully Distributed	1	

## Charged Positions

CHARGED POSITIONS													
Distribution Index Code	Account Code	Planned Position	Current Position Budget	Current LD%	Zero Out LD%?	LD Override %	LD Override \$	Planned LD Budget	Planned Headcount	Variance	Comment	Home Index	Home Dept Program

## How To Update Position Budgets

Update the Index Requested Budget from the **Position Budget Updates** section after selecting the position from the **Home Positions** section.

**Position Budget Updates**

Preliminary Position Budget:

Permanent Change %:

Leave Type:

Total Permanent Reallocation:

Permanent Change \$:

Planned One-Time Savings:

**To Add a New Position**

- Click on the button below.
- When prompted, enter in a Display Name in the following format: "Index - Position Title" (e.g. 100000-Professor).
- Enter in a salary, if known, then click "Submit".
- Once entered, use the Add Labor Distribution button below to assign the index and account number.

[Add New Position](#)

HOME POSITIONS							
	Incumbent	Index Preliminary Budget	Index Requested Budget	LD %	Distribution Status	Planned Operating Headcount	Comments
TB5555 - Silver and Bling		287,900.00	287,900.00			3	
PO1015 - Lecturer	Chaos, Chris	72,508.00	72,508.00	100.0%	Fully Distributed	1	
PO1043 - Professor	Butler, Nicholas	92,943.00	92,943.00	100.0%	Fully Distributed	1	
PO1047 - Associate Professor	Puth, Charlie	122,449.00	122,449.00	100.0%	Fully Distributed	1	

Enter a *Permanent Change %* (percentage) or *Permanent Change (\$)* (dollar amount). This should be the incremental change to the preliminary budget. Changes made to these two fields are summarized in the *Total Permanent Reallocation* field.

You can calculate *Planned One-Time Savings* for planned leave by selecting the applicable *Leave Type* from the drop down (for reporting purposes only; this does not update Requested Budget).

**Note:** All reallocations require a comment of the change. The Comment column will turn red if a comment is needed.

HOME POSITIONS							
	Incumbent	Index Preliminary Budget	Index Requested Budget	LD %	Distribution Status	Planned Operating Headcount	Comments
TB5555 - Silver and Bling		287,900.00	291,300.32			3	
PO1015 - Lecturer	Chaos, Chris	72,508.00	75,408.32	100.0%	Fully Distributed	1	
PO1043 - Professor	Butler, Nicholas	92,943.00	93,443.00	100.0%	Fully Distributed	1	Salary Increase
PO1047 - Associate Professor	Puth, Charlie	122,449.00	122,449.00	100.0%	Fully Distributed	1	


How To Add a New Position

Click on the green “Add New Position” Button. You will be prompted to enter a:

1. *Display Name* – Use the following format: "Index - Position Title" (e.g. 100000-Professor).
2. *Permanent Change (\$)* – this is optional. This information can also be updated on the Position Budget Updates card after the position is created.

**To Add a New Position**

1. Click on the button below.
2. When prompted, enter in a Display Name in the following format: "Index-PositionTitle" (e.g. 100000-Professor). *Ensure not to leave a space.*
3. Enter in a salary, if known, then click "Submit".
4. Once entered, use the Add Labor Distribution button below to assign the index and account number.



**Note:** If a position was created in error, reach out to [budget@tc.columbia.edu](mailto:budget@tc.columbia.edu) who will be able to remove the position.

How To Update Position Labor Distributions

After selecting the position from the **Home Positions** section, scroll down to the **Labor Distributions** section.

HOME POSITIONS				
	Incumbent	Index Preliminary Budget	Index Requested Budget	LD %
ML2222 - Programs		66,504.10	62,879.29	
ML2222_PL6000 - FT Salary Pool		30,256.00	30,256.00	100.0%
PO2059 - Secretary	Potter, William Appleton	36,248.10	32,623.29	60.0%

Position Distribution KPI 
+ Add Labor Distribution
Process Changes (ADMIN ONLY)
- Remove Distribution

● -

**LABOR DISTRIBUTIONS**

Planned Position	Index	Account	Current Position Budget	Current LD %	Zero Out LD?	LD Override %	LD Override \$	Planned LD Budget	Variance	Comments	Remove Distribution?	Charged Distribution?
PO2059 - Secretary	ML2222	6211	36,248.10	70.00%	<input type="checkbox"/>	60.00%	-	32,623.29	(3,624.81)	test	<input type="checkbox"/>	<input type="checkbox"/>
PO2059 - Secretary	500000	6211	15,534.90	30.00%	<input type="checkbox"/>	40.00%	-	21,748.86	6,213.96	test	<input type="checkbox"/>	<input type="checkbox"/>

Enter a new percentage in the LD Override % column or enter a new amount in the LD Override \$ column.

To add a new labor distribution, click on the blue “Add Labor Distribution” button. You will be prompted to:

1. Select the Index Code
2. Select an Account Code
3. Select Submit
4. Enter a new percentage in the LD Override % column or enter a new amount in the LD Override \$ column for the new distribution.

To remove a new labor distribution (only newly added labor distributions can be removed):

1. Check the Remove Distribution check box
2. Click the red “Remove Distribution” button

**Note:** If a position is under distributed, the Distribution Status in the **Home Positions** section will be highlighted red and will read "Under Allocated", indicating that corrections need to be made.

### 2.1 Full Time & Union Position Budget Summary

This dashboard is used to review the changes that were made on the Full Time & Union Position Planning page and make any necessary corrections to reallocations based on the checks provided. If a Department Approver has submitted the budget to you, use this page to make any necessary changes or updates, or [return the budget for correction](#) for the Department Approver to make the corrections.

The **Full Time & Union Position Checks** card displays four budget checks for all the indices you manage.

1. Check 1: All Reallocations Net to Zero or Less (*Note: Ultimately, the VP area should net to zero or less, and will not be able to submit otherwise*).
2. Check 2: All Reallocations Have Comments
3. Check 3: All Positions are Fully Distributed
4. Check 4: All Distribution Changes Have Comments

If any index does not pass a check, the associated cell will be highlighted in red. Passed checks will be check marked and highlighted green. The Reviewed? check box is not required. Use this column if you have a lot of indexes and want to keep track of the ones you’ve completed review for.

Full Time & Union Position Checks					
	Check 1: Reallocations Net Zero or Less?	Check 2: All Position Changes Have Comments?	Check 3: All Positions Fully Distributed?	Check 4: All Distribution Changes Have Comments?	Reviewed?
ML1111 - Administration	☑	☑	☑	☑	☐
ML2222 - Programs	☐	☐	☑	☐	☑
BA3333 - Operations	☑	☑	☑	☑	☐
KB4444 - General	☑	☑	☑	☑	☐
TB5555 - Silver and Bling	☑	☑	☑	☑	☐

Use the sections below the **Full Time & Union Position Checks** card to review and/or make any necessary corrections.

The **Check 1 and 2** card allows you to make corrections to satisfy these two checks. The card displays all position reallocations made for the index selected in the **Full Time & Union Position Checks** card. Enter any changes to the Requested Position Salary by updating the Permanent Change (\$) column. Enter any missing comments in the Comments column. Alternatively, corrections can be made back in the 2.1 Full Time and Union Position Planning dashboard, **Position Budget Updates** card.

Full Time & Union Position Checks						Index Level Comments
	Check 1: Reallocations Not Zero or Less?	Check 2: All Position Changes Have Comments?	Check 3: All Positions Fully Distributed?	Check 4: All Distribution Changes Have Comments?	Reviewed?	Index Submission Comments
ML1911 - Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ML2222 - Programs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BA3333 - Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
KB4444 - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TB5555 - Silver and Bling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

CHECK 1 and 2				
	Home Index	Permanent Change \$	Requested Position Salary	Comments
PO2059 - Secretary	ML2222 - Programs	\$ 100,000.00	\$ 151,783.00	

The **Check 3** card displays any positions that are not 100% distributed. You will need to go back to the 2.1 Full Time and Union Position Planning dashboard to make any corrections for this check.

The **Check 4** card displays all position labor distribution changes missing comments. Enter any missing comments in the Comments column. Alternatively, comments can be entered back in the 2.1 Full Time and Union Position Planning dashboard, **Labor Distributions** card.

CHECK 3		
	Home Index	Distribution Status
PO2059 - Secretary	ML2222 - Programs	Under Allocated

CHECK 4									
Planned Position	Index	Account	Current Position Budget	Current LD %	Zero Out LD%?	LD Override %	Planned LD Budget	Variance	Comments
PO2059 - Secretary	ML2222	6211	36,248.10	70.00%	<input type="checkbox"/>	60.00%	91,069.80	54,821.70	
PO2059 - Secretary	500000	6211	15,534.90	30.00%	<input type="checkbox"/>	30.00%	45,534.90	30,000.00	

## 2.2 Part Time Budget

This dashboard is used to develop the Requested Budget for all Part Time accounts for the departments you manage. If a Department Approver has submitted the budget to you, use this page to make any necessary changes or updates, or [return the budget for correction](#) for the Department Approver to make the corrections.

This **Net Change in Part Time Reallocations** metric will stay green if the net allocations are zero or less. It will turn red if the net allocations are greater than zero.

By default, the **Part Time Reallocations Input** card is filtered to only those accounts that have Actuals within the last three years, a current year Approved Budget, a planning year Preliminary Budget or a Reallocation Input. If there is a need to enter a budget for an account that is not shown, select the **Show All Accounts** checkbox to display all part time accounts.

**Net Change in PT from Reallocations for selection**

● (\$ 2,000.00)

Show All Accounts

### How To Enter Part Time Requested Budget

In the **Part Time Reallocation Input** card, enter a reallocation amount in the *Reallocation Input* column. You will need to enter the incremental change to the preliminary budget. The *Requested Based Budget* will update accordingly. Enter a *Comment* for each reallocation made.

Index	Account	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation Input	FY '24 Requested Base Budget
ML1111 - Administration	6122 - PT Instructors Exe...	5,579.97	18,108.96	5,655.96	3,686.47	3,686.47	-	3,686.47
ML1111 - Administration	6132 - PT Adjunct Profes...	30,370.11	24,670.08	28,891.06	29,552.76	29,552.76	(5,000.00)	24,552.76
ML1111 - Administration	6254 - Temporary Profes...	16,886.22	28,946.00	38,356.00	26,917.00	26,917.00	3,000.00	29,917.00
ML1111 - Administration	6422 - TA/RA - Part-Time	1,154.00	520.00	2,181.00	4,581.01	4,581.01	-	4,581.01

Refresh the page to populate the summary of changes on the **Part Time Reallocations Summary** card. This populates all list of accounts with reallocations made. Changes to the *Requested Base Budget* can be made in the *Reallocation Input* column of this card as well.

Index	Account	FY '24 Preliminary Budget	Reallocation Input	FY '24 Requested Base Budget	Comments
ML1111 - Administration	6132 - PT Adjunct Profess...	29,552.76	(5,000.00)	24,552.76	test
ML1111 - Administration	6254 - Temporary Professi...	26,917.00	3,000.00	29,917.00	


### 2.3 OTPS Budget

This dashboard is used to develop the Requested Budget for all OTPS accounts for the departments you manage. If a Department Approver has submitted the budget to you, use this page to make any necessary changes or updates, or [return the budget for correction](#) for the Department Approver to make the corrections.

The **Net Change in OTPS Reallocations** metric will stay green if the net allocations are zero or less. It will turn red if the net allocations are greater than zero.

By default, the **OTPS Reallocations Input** card is filtered to only those accounts that have Actuals within the last three years, a current year Approved Budget, a planning year Preliminary Budget or a Reallocation Input. If needed, select the **Show All Accounts** checkbox to display all OTPS accounts.

**Net Change in PT from Reallocations for selection**



Show Accounts with All Zeros

### How To Enter OTPS Requested Budget

In the **OTPS Reallocations Input** card, enter a reallocation amount in the *Reallocation Input* column. You will need to enter the incremental change to the preliminary budget. The *Requested Based Budget* will update accordingly. Enter a *Comment* for each reallocation made.

OTPS Reallocation Input													
Index	Account	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation Input	FY '24 Requested Base Budget	FY '24 Departmental Adjustments	FY '24 VP Adjustments	FY '24 Adj Requested Base Budget	FY '24 New Budget Requests	Comments
ML1111 - Administration	7211 - Contractor/Consulting Svc-Other	1,971.00	658.00	3,933.00	5,163.10	5,163.10		5,163.10	-	-	5,163.10	-	
ML1111 - Administration	7221 - Purchased Services	79.00	121.00	1,714.00	462.59	462.59		462.59	-	-	462.59	-	
ML1111 - Administration	7116 - Computer Supplies	536.28	233.00	652.91	787.00	787.00		787.00	-	-	787.00	-	
ML1111 - Administration	7112 - Office Supplies	1,408.00	2,672.00	1,648.00	1,607.00	1,607.00		1,607.00	-	-	1,607.00	-	
ML1111 - Administration	7322 - Conf. Meetings & Oth Related Exp	282.00	1,070.00	19.00	1,966.00	1,966.00		1,966.00	-	-	1,966.00	-	
ML1111 - Administration	7196 - IDC - Duplicating	819.00	796.00	208.00	356.82	356.82		356.82	-	-	356.82	-	
ML1111 - Administration	7622 - Honorariums: Domestic US	540.00	307.00	2,173.00	926.00			926.00	-	-	926.00	-	
ML1111 - Administration	PL7000 - Operating Expenses Budget Pool	-	-	-	243.00			243.00	-	-	243.00	-	

ML1111 - Administration | All Account Depts

Refresh the page to populate the summary of changes on the **OTPS Reallocations Summary** card. This populates all list of accounts with reallocations made. Changes to the *Requested Base Budget* can be made in the *Reallocation Input* column of this card as well.

OTPS Reallocations Summary					
Index	Account	FY '24 Preliminary Budget	Reallocation Input	FY '24 Requested Base Budget	Comments
ML1111 - Administration	7112 - Office Supplies	1,607.00	(1,607.00)	-	

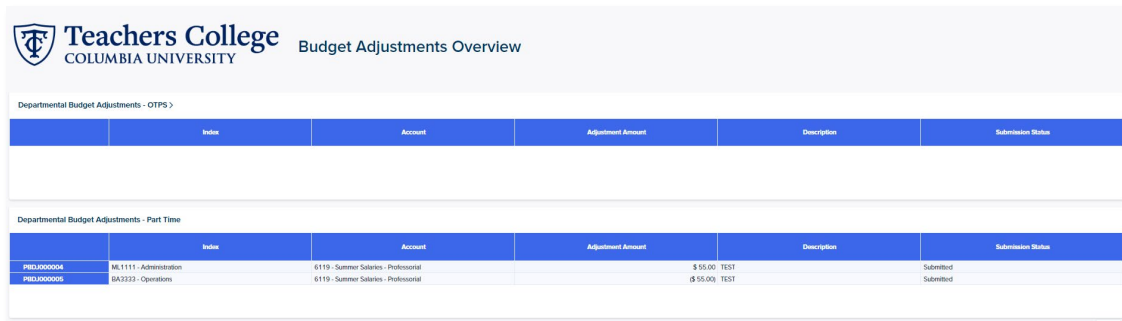


## Operating Budget Adjustments

This section is where VP Area Approvers or VP Approvers will create and submit budget adjustments to the base budget.

### 3.0 Budget Adjustment Dashboard

This dashboard provides an overview of all budget adjustments submitted by the Department Approver, VP Approver or Budget Office along with their submission status.



Teachers College COLUMBIA UNIVERSITY Budget Adjustments Overview

Departmental Budget Adjustments - OTPS >

Index	Account	Adjustment Amount	Description	Submission Status

Departmental Budget Adjustments - Part Time

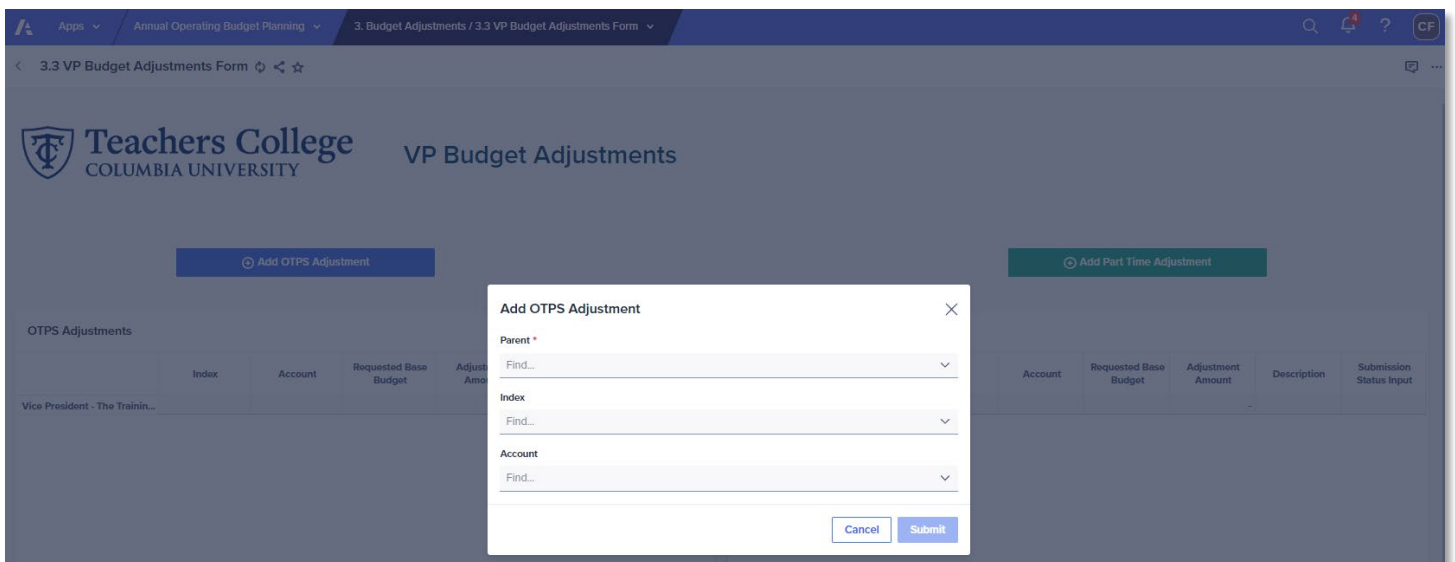
Index	Account	Adjustment Amount	Description	Submission Status
002.000000	041111 - Administration	6119 - Summer Salaries - Professional	\$ 50.00 TEST	Submitted
002.000000	042252 - Operation	6119 - Summer Salaries - Professional	-\$50.00 TEST	Submitted

### 3.1 Budget Adjustments Form - VP

This dashboard is used to create and submit VP level budget adjustments. This dashboard can be used instead of the planning screen for Part Time and OTPS adjustments.

#### How to Enter a Budget Adjustment

1. Click on the appropriate "Add" button to make an adjustment for either an OTPS account or a Part Time Account



Teachers College COLUMBIA UNIVERSITY VP Budget Adjustments

Buttons: Add OTPS Adjustment, Add Part Time Adjustment

OTPS Adjustments Table:

Index	Account	Requested Base Budget	Adjustment Amount	Description	Submission Status Input
Vice President - The Trainin...					

**Add OTPS Adjustment** Modal:

Parent \* Find...

Index Find...

Account Find...

Buttons: Cancel, Submit

2. When prompted, enter a Parent. By default this will show all VP areas you have jurisdiction over.
3. Enter in an Index and Account. These can be changed after an adjustment has been created.
4. Click "Submit". This will populate the associated table with the requested adjustment, assigning a unique identifier.
5. Once an adjustment line is created, enter in an amount and a description.
6. Select "Submitted" in the Submission Status Input column once these items have been entered.

Only adjustments that are marked as "Submitted" will appear in the Departmental Adjustments column in the OTPS and Part Time Budget Development pages.

## Operating Budget Review & Submissions

### 4.0 Budget Review & Submission – VP

This dashboard is used to do a final review of the Net Zero Reallocation check and submit the Requested Budget for Budget Approval. You are required to submit the budget for each index.

The **Submission Checks & Status** card will do an overall check for *Net Zero Reallocations?* This check ensures all reallocations net to zero or less. If any index does not pass the check, the associated cell will be highlighted in red. Passed checks will be check marked and highlighted green. **A VP area must net to zero or less as a unit to be eligible to submit the budget.**

	Net Zero Reallocations?	Index Submission	Program Approval Status	Dept Approval Status	Operating Budget Dept Approval Status	Ready for VP Area Review?	VP Area Review Status	Ready for VP Approval?	VP Approval Status	Feedback Addressed?
Vice President - The Training S...	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Manhattan Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
ML1111 - Administration	<input type="checkbox"/>	Submitted	Approved		Available for ...	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
ML2222 - Programs	<input checked="" type="checkbox"/>	Submitted	Approved		Available for ...	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Big Apple Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
BA3333 - Operations	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>
Columbia Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Knickerbocker Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
KB4444 - General	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Tiffany Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
TB5555 - Silver and Bli...	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

In this card, you will be able to submit your budget and for any items that have been returned for correction, indicate that you have addressed any feedback.

The **Submission Notes / Commentary** card is used to leave any *VP Level Notes* on the budget submission (all other Notes fields are not editable by a VP Area or VP Approver). Select the index to leave a note on from the Submission Checks & Status card first, which will update the Commentary card.

Submission Checks & Status

	Net Zero Reallocations?	Index Submission	Program Approval Status	Dept Approval Status	Operating Budget Dept Approval Status	Ready for VP Area Review?	VP Area Review Status	Ready for VP Approval?	VP Approval Status	Feedback Addressed?
Vice President - The Training S...	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Manhattan Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
ML1111 - Administration	<input type="checkbox"/>	Submitted	Approved		Available for ...	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
ML2222 - Programs	<input checked="" type="checkbox"/>	Submitted	Approved		Available for ...	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Big Apple Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
BA3333 - Operations	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>
Columbia Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Knickerbocker Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
KB4444 - General	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Tiffany Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
TB5555 - Silver and BL...	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

Submission Notes / Commentary

Index Level Notes

Program Level Notes

Department Level Notes

VP Level Notes

Enter Notes

Budget Office Notes

ML2222 - Programs

If the Net Zero Reallocations check does not pass, the **Submission Check Summary** will populate with a list of all reallocations made by account number and planning category (FT & Union, Part Time & OTPS). Changes to reallocations can be made in the Reallocation Input column for Part Time & OTPS. Changes to reallocations for Full Time & Union need to be made in the 2.1 Full Time & Union Position Planning dashboard.

Submission Check Summary for ML1111 - Administration

	Change Category	FY '24 Preliminary Budget	Reallocation (\$)	Reallocation Input	FY '24 Departmental Adjustments	FY '24 VP Adjustments	FY '24 Adj Requested Base Budget	Comments	Index
7112 - Office Supplies	OTPS	1,607.00	1,607.00	1,607.00	-	-	3,214.00		ML1111 - Administration

ML1111 - Administration FY24

### How To Submit and/or Approve Your Budget

If you are submitting the budget instead of a Department Approver, three steps must be taken before approving as VP Level:

1. Click the drop-down option on the Index Submission column and select “Submitted”.
2. Click the drop-down option on the Program Approval Status column and select “Approved”.
3. Click the drop-down option on the Department Approval Status column and select “Approved”.

The Ready for VP Area Review or Ready for VP Approval? columns will turn green when all indexes that roll up to your VP area have been submitted.

Once the Ready for VP Area Review or Ready for VP Approval? column is green, you will be able to approve the budget by clicking the drop-down option on the VP Area Review Status or the VP Approval Status column and select “Approved”. This will move the item to the next step in the approval process. You will not be able to edit your budget after submitting.

Bulk Approve      ← Return For Correction      2.4 OTPS Budget Development >

Submission Checks & Status

	CHECK: Net Zero Reallocations?	Ready for Dept Approval?	Index Submission	Program Approval Status	Operating Budget Program Approval Status	Feedback Addressed?	Dept Approval Status
Columbia Blue	<input checked="" type="checkbox"/>						
Knickerbocker Blue	<input checked="" type="checkbox"/>						
KB4444 - General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	Approved	Program Manager A...	<input type="checkbox"/>	Approved
Tiffany Blue	<input checked="" type="checkbox"/>						
TB5555 - Silver and Bling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	Approved	Program Manager A...	<input type="checkbox"/>	Returned

Submission Notes / Commentary

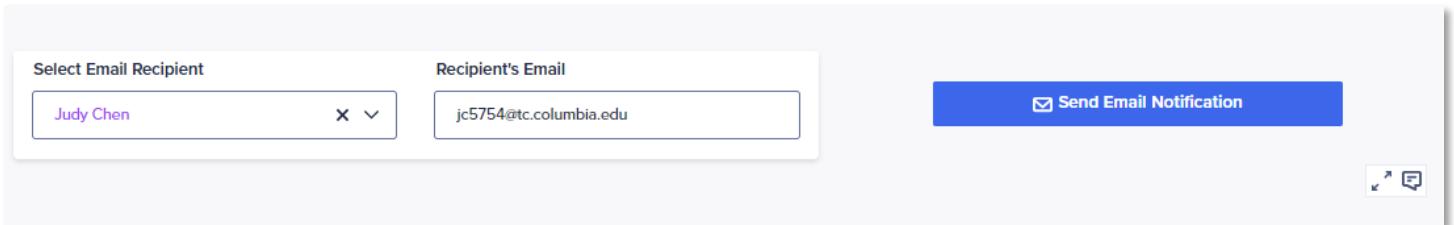
Index Level Notes

**Tip!** –Use the “Bulk Approve” button to approve all indices at once.

**Note:** The 1.0 Budget Development Status Dashboard will update to show the changes in the approval workflow.

If needed, you can send someone an email notification related to the submission process:

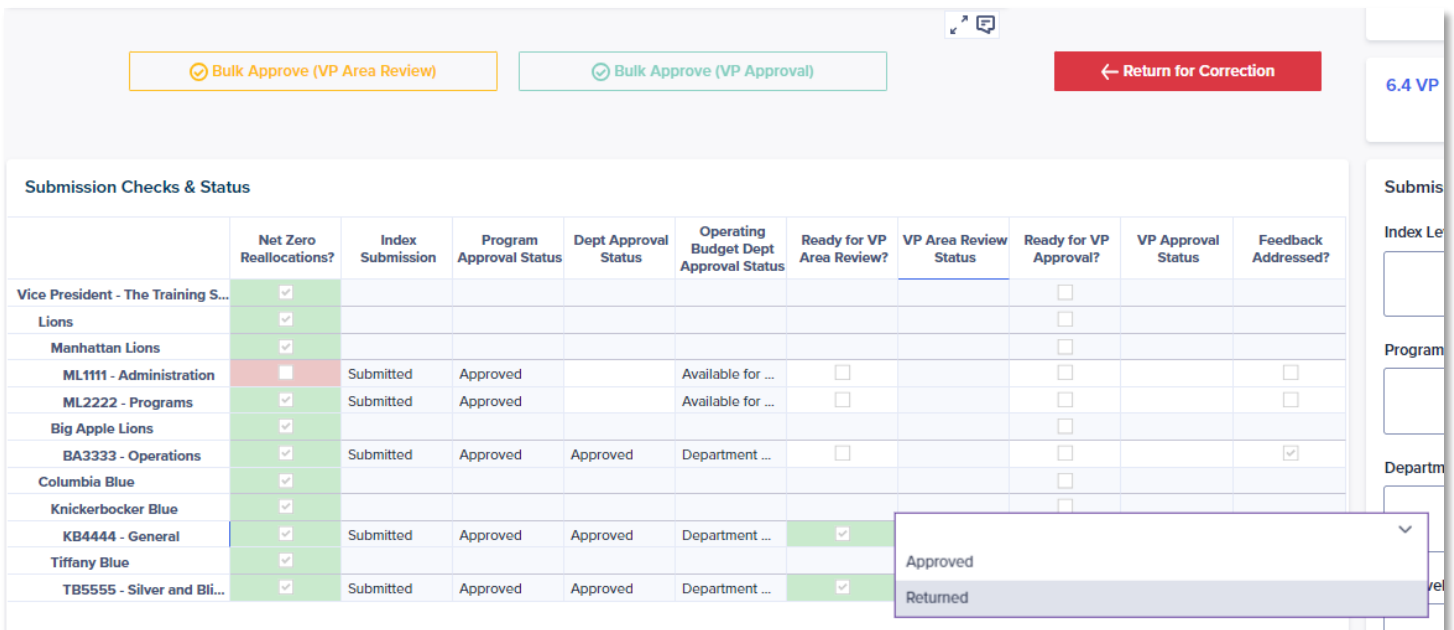
1. Select an Email Recipient from the drop-down list. This will populate the Recipient’s Email.
2. Click on the “Send Email Notification” button. A prompt will appear.
3. You can add to the prepopulated message (“Please review budget submissions”) by typing in the Message box.
4. Click Send.
5. The recipient will receive the email with your note which will include a link that will take them back to the submissions page.



How to Return a Budget for Correction

Enter a comment on the *VP Level Notes* section in the **Submission Notes /Commentary** card related to the corrections that need to be made. Alternatively, you can send an email notification with this information.

Only when the *Ready for VP Area Review* or *Ready for VP Approval?* column is green, you will be able to return the budget by clicking the drop-down option on the *Dept Approval Status* column and select “Return”. Then select the “Return for Correction” button.



	Net Zero Reallocations?	Index Submission	Program Approval Status	Dept Approval Status	Operating Budget Dept Approval Status	Ready for VP Area Review?	VP Area Review Status	Ready for VP Approval?	VP Approval Status	Feedback Addressed?
Vice President - The Training S...	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Manhattan Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
ML1111 - Administration	<input type="checkbox"/>	Submitted	Approved		Available for ...	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
ML2222 - Programs	<input checked="" type="checkbox"/>	Submitted	Approved		Available for ...	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
Big Apple Lions	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
BA3333 - Operations	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>
Columbia Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
Knickerbocker Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
KB4444 - General	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
Tiffany Blue	<input checked="" type="checkbox"/>							<input type="checkbox"/>		
TB5555 - Silver and Bli...	<input checked="" type="checkbox"/>	Submitted	Approved	Approved	Department ...	<input checked="" type="checkbox"/>		<input type="checkbox"/>		

How To Resubmit Your Budget After it has Been Returned for Correction

If a budget has been returned for to you for correction, the VP Area Review Status and VP Approval Status will clear and the Feedback Addressed? column will be highlighted in red.

Submission Checks & Status					
	Net Zero Reallocations?	Ready for Program Approval?	Index Submission	Program Approval Status	Feedback Addressed?
Manhattan Lions	<input type="checkbox"/>				
ML1111 - Administration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted		<input type="checkbox"/>
ML2222 - Programs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	Approved	<input type="checkbox"/>
Big Apple Lions	<input checked="" type="checkbox"/>				
BA3333 - Operations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	Approved	<input type="checkbox"/>
Knickerbocker Blue	<input checked="" type="checkbox"/>				
KB4444 - General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	Approved	<input type="checkbox"/>
Tiffany Blue	<input checked="" type="checkbox"/>				
TB5555 - Silver and Bling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Submitted	Approved	<input type="checkbox"/>

1. Review any notes left in the **Submission Notes / Commentary** card for the index that was returned.
2. Make any necessary corrections in the **Submission Check Summary** card or in the related planning section.
3. Indicate that the corrections were made by checking off the Feedback Addressed? checkbox.
4. Resubmit your budget by clicking the drop-down option on the VP Area Review Status or VP Approval Status column and selecting "Submitted".

Submission Checks & Status			
	Net Zero Reallocations?	Index Submission	Feedback Addressed?
ML1111 - Administration	<input checked="" type="checkbox"/>	Submitted	<input checked="" type="checkbox"/>
ML2222 - Programs	<input type="checkbox"/>	Submitted	<input type="checkbox"/>
BA3333 - Operations	<input checked="" type="checkbox"/>	Submitted	<input type="checkbox"/>
KB4444 - General	<input checked="" type="checkbox"/>	Submitted	<input type="checkbox"/>
TB5555 - Silver and Bling	<input checked="" type="checkbox"/>	Submitted	<input type="checkbox"/>

## New Budget Requests

### 5.0 New Budget Requests - VP

This dashboard is used to review, approve or create requests for incremental increases to your base budget and monitor the approval status of the requests. Review the requirements for new budget request considerations before moving forward.

#### To Approve, Deny or Return a New Budget Request


Department and Program Approvers have the ability to create new budget request for VP review and approval. New requests submitted will be shown in the **New Budget Requests Submissions** card.

1. As a VP Approver, rank each new budget requests created from highest priority to lowest, with 1 being the highest priority. Do this on the VP Rank column.
2. From the VP Area Review or VP Approval Status column, you can choose to Approve, Deny or Return the request.
3. If you want to return the request, after selecting the Return status, click on the Return for Correction button.

New Budget Requests Submission												
Initiative	Department	Strategic Priority	One Time Cost (\$)	Annual Recurring Cost (\$)	Submit?	Dept Rank (1 being highest priority)	Department Approval Status	VP Rank (1 being highest priority)	VP Area Review Status	VP Approval Status	Review Status	
CR000060 - L... Live Test	Lions	Diversity, Equity & Inclusion	\$ 2,424	\$ 3,535	<input checked="" type="checkbox"/>	0	Approved	0	Returned		Pending	
CR000061 - D... Digital initiative	Lions	Lead in Digital Innovation	-	\$ 15,000	<input checked="" type="checkbox"/>	0	Approved	0	Returned		Pending	
CR000063 - ... Additional fund	Lions	Enhance Student Pathways	\$ 4,000	\$ 33,000	<input checked="" type="checkbox"/>	3		0			Pending	

#### To Submit a New Budget Request

1. Click on the “Add New Budget Request” button.



**Teachers College**  
COLUMBIA UNIVERSITY

## New Budget Requests

All VP areas should take a fresh look at their Preliminary Budget and reprioritize their existing base to support their initiatives. New incremental funding requests need to be justified in the Brief Description/Justification, Base Budget Funding Availability and Describe Anticipated Impact sections. Please note that the request may not be approved depending on the enrollment and revenue outcome. Thus, all units should be prepared to adjust their budget requests accordingly.

[Add New Budget Request](#)

2. In the pop-up screen, you will need to enter:
  - a. The relevant **Departmental Program**
  - b. A short title for the **Initiative** (less than 60 characters)

- c. **Strategic Priority** type
  - d. **One Time Cost (\$)** - Enter requested one-time funding AND/OR
  - e. **Annual Recurring Cost (\$)** - Enter requested recurring funding
  - f. **Brief Description/Justification**
  - g. **Base Budget Funding Availability**
  - h. **Describe Anticipated Revenue Growth to Cover Expenses**
3. Select "Submit" after all relevant fields have been entered
  4. Rank each new budget requests created from highest priority to lowest, with 1 being the highest priority. Do this on the VP Rank column.
  5. Change the VP Area Review or VP Approval Status to Approved. This will move the request to the next approval level.

New Budget Requests Submission												
Initiative	Department	Strategic Priority	One Time Cost (\$)	Annual Recurring Cost (\$)	Submit?	Dept Rank (1 being highest priority)	Department Approval Status	VP Rank (1 being highest priority)	VP Area Review Status	VP Approval Status		
CR000060 - L... Lise Test	Lions	Diversity, Equity & Inclusion	\$ 2,424	\$ 3,535	<input checked="" type="checkbox"/>	0	Approved	0	Returned			
CR000061 - D... Digital initiative	Lions	Lead in Digital Innovation	-	\$ 15,000	<input checked="" type="checkbox"/>	0	Approved	0	Returned			
CR000063 - ... Additional fund	Lions	Enhance Student Pathways	\$ 4,000	\$ 33,000	<input checked="" type="checkbox"/>	3						

Brief Description/Justification      Base Budget Funding Availability      Describe Anticipated Revenue Growth to Cover Expenses      Dept/VP Comments

**Note:** An amount must be entered in at least one of the **One Time Cost (\$)** and **Annual Recurring Cost (\$)** fields to be able to submit the request.



## Instructions for Zero-Based Budget Planning

After completing the Reallocation Input entries, Zero-based budget units are expected to complete the Zero-Based Budget Adjustment columns to identify potential expense savings/cuts that can be achieved should the College experience an enrollment shortfall or a deficit. These adjustments should enable your area to maintain minimum resource needs to meet your critical operation needs. All zero budget requests should be justified through the Zero-Based Budget Justification column.

### 2.1 Zero Based Full Time & Union Position Budget

#### How To Make a Zero-Based Position Adjustment

Update the Zero-Based Budget Request from the **Position Budget Updates** section after selecting the position from the **Home Positions** section.

Enter an amount to adjust the Index Preliminary Budget by in the Zero-Based Position Adjustment \$ field. All Zero-based adjustments require a justification of the change. Enter a justification in the Zero-Based Budget Justification column.

#### Position Budget Updates

Preliminary Position Budget <input type="text" value="\$ 70,184.00"/>	Total Permanent Reallocation <input type="text" value="-"/>
Permanent Change % <input type="text" value="-"/>	Permanent Change \$ <input type="text" value="-"/>
Zero Based Position Adjustment \$ <input type="text" value="(\$ 15,000.00)"/>	Zero Based Budget Justification <input type="text" value="Can hire an employee at a lower level salary"/>
Leave Type <input type="text" value="Find..."/>	Leave Savings <input type="text" value="-"/>

#### To Add a New Position

1. Click on the button below.
2. When prompted, enter in a Display Name in the following format: "Index - Position Title" (e.g. 100000-
3. Enter in a salary, if known, then click "Submit".
4. Once entered, use the Add Labor Distribution button below to assign the index and account number.
5. Please be sure to offset the new position budget by lowering salary budgets for other positions.

#### HOME POSITIONS

	Incumbent	Index Preliminary Budget	Index Requested Budget	LD %	Distribution Status
BA3333 - Operations		614,662.00	528,983.00		
BA3333 - Test Position		-	-	0.0%	Fully Distributed
BA3333 - New Analyst		-	-	0.0%	Fully Distributed
BA3333_PL6000 - FT Salary Pool		214.00	214.00	100.0%	Fully Distributed
PO2017 - Program Coordinator	Rox, Johnny	65,016.00	65,016.00	100.0%	Fully Distributed
PO2026 - Assistant Director	Hall, Tony	74,587.00	74,587.00	100.0%	Fully Distributed
PO2045 - Assistant Director	Alberti, Eva Allen	70,184.00	70,184.00	100.0%	Fully Distributed
PO2049 - Director	Booker, James	90,200.00	100,200.00	100.0%	Fully Distributed
PO2089 - Associate Director	Thomas, Irma	85,679.00	-	0.0%	Fully Distributed

Any Zero-based Position Adjustments without a justification will be picked up in page **2.2 Zero Based Position Budget Summary**, in Check 5: All Zero-Based Budget Changes Have Comments. Enter any missing justifications in the **Check 5** card.

### 2.3 Zero Based Part Time Budget

#### How To Make a Part-Time Zero-Based Budget Adjustment

In the **Part Time Reallocation Input** card, enter an adjustment amount in the Zero-Based Budget Adjustment column. The Effective Minimum Zero-based Budget Request column will update accordingly. Enter a Zero-Based Budget Justification for each adjustment made.

Part Time Reallocation Input																
	Index	Account	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation Input	FY '24 Requested Base Budget	FY '24 Departmental Adjustments	FY '24 VP Adjustments	FY '24 Adj Requested Base Budget	Comments	Zero Based Budget Adjustment	Effective Minimum Zero Based Budget Request	Zero Based Budget Justification
6122 - PT Instructors Exempt	ML1111 - Admins...	6122 - PT Instruct...	5,579.97	18,108.96	5,655.96	3,686.47	3,686.47	(3,000.00)	686.47	-	-	686.47	Adjunct hire	-	686.47	
6132 - PT Adjunct Professor ...	ML1111 - Admins...	6132 - PT Adjunct ...	30,370.11	24,670.08	28,891.06	29,552.76	29,552.76	6,000.00	35,552.76	-	-	35,552.76	Adjunct hire	-	35,552.76	
6244 - PT Professional Non-E...	ML1111 - Admins...	6244 - PT Professi...	-	-	-	-	-	-	-	-	1,000.00	1,000.00	Training	-	1,000.00	
6254 - Temporary Profession...	ML1111 - Admins...	6254 - Temporary ...	16,886.22	28,946.00	38,356.00	26,917.00	26,917.00	(26,000.00)	917.00	-	(1,000.00)	(83.00)	Training	-	(83.00)	
6422 - TA/RA - Part-Time	ML1111 - Admins...	6422 - TA/RA - Par...	1,154.00	520.00	2,181.00	4,581.01	4,581.01	25,000.00	29,581.01	-	-	29,581.01	Training	(24,000.00)	5,581.01	Per Historical

### 2.4 Zero Based OTPS Budget

#### How To Make an OTPS Zero-Based Budget Adjustment

In the **OTPS Reallocation Input** card, enter an adjustment amount in the Zero-Based Budget Adjustment column. The Effective Minimum Zero-based Budget Request column will update accordingly. Enter a Zero-Based Budget Justification for each adjustment made.

OTPS Reallocation Input															
	Index	Account	FY '20 Actuals	FY '21 Actuals	FY '22 Actuals	FY '23 Approved Budget	FY '24 Preliminary Budget	Reallocation Input	FY '24 Requested Base Budget	FY '24 Departmental Adjustments	FY '24 VP Adjustments	Comments	Zero Based Budget Adjustment	Effective Minimum Zero Based Budget Request	Zero Based Budget Justification
ML1111 - Administration	7112 - Office Supplies		1,408.00	2,672.00	1,648.00	1,607.00	1,607.00	-	1,607.00	-	-		(1,607.00)		Would not be
ML1111 - Administration	7116 - Computer Supplies		536.28	233.00	652.91	787.00	787.00	-	787.00	-	-			787.00	
ML1111 - Administration	7196 - IDC - Duplicating		819.00	796.00	208.00	356.82	356.82	-	356.82	-	-			356.82	
ML1111 - Administration	7211 - Contractor/Consult...		1,971.00	658.00	3,933.00	5,163.10	5,163.10	-	5,163.10	-	-			5,163.10	need at least 3000
ML1111 - Administration	7221 - Purchased Services		79.00	121.00	1,714.00	462.59	462.59	-	462.59	-	-			462.59	
ML1111 - Administration	7322 - Cont. Meetings & ...		282.00	1,070.00	19.00	1,966.00	1,966.00	-	1,966.00	-	-			1,966.00	
ML1111 - Administration	7622 - Honorariums, Dom...		540.00	307.00	2,173.00	926.00	926.00	-	926.00	-	-			926.00	
ML1111 - Administration	PL7000 - Operating Expe...		-	-	-	243.00	243.00	-	243.00	-	-			243.00	