Memo

To:	BCOE Management and Staff
From:	Andrew James, Fiscal Services
CC:	
Date:	01/12/2011
Re:	Email Budget Revision

Financial Services has created a new way for program staff to submit budget revision forms; via email. In the past program managers and staff were required to submit paper budget revisions and these are still perfectly acceptable, but now we also have an email based process at the program manager's disposal. This process is also outlined in the "Budget Operating Procedure".

Our hope is that the email budget revision process will be a better, more time-efficient tool for program staff in addition to a process that requires no paper or printing which will directly save programs money.

Here is the new process:

1. An electronic budget revision is created by a program staff or manager; this can consist of a marked-up Adobe Acrobat IFAS print-out, a Microsoft document (Word or Excel) or a plain email message; basically any electronic document will work. The BSF-73 New Budget/Budget Revision form may also be used. The budget revision must contain the appropriate org key(s), object code(s), and revised amount(s).

2. Once completed, the program staff will email the budget revision email to the program manager for approval. Approval consists of the program manager emailing the Financial Services inbox (financialservices@bcoe.org) and writing a message specifically approving the budget revision. For example, the program manager could write, "I approve this budget revision" or "Please post this revision". If the program manager creates the budget revision themselves, then the program manager can simply email the revision to the Financial Services Inbox with their approval.

3. Once the revision is entered into IFAS by the Financial Services staff, an email confirmation will be sent to the program manager. If a program manager wants this budget revision to have the confirmation email sent to people other than just themselves, they need to CC: those people on the email so Financial Services can simply hit "replay to all" when confirming the budget revision is completed.

4. The email and any attachments are saved to network folder as backup.

Example of email budget revision

Program Name:	Fiscal Services
Cost Center:	000340
Budget Year:	2010-2011
Project Year (if applicable):	N/A
Revisions (org key – object – new amount)	0100007210-5800 - $300

I authorized this budget revision.

Sincerely,
Marley Manager

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FS-1011-047