FAMIS Budget Module Refresher

Notes applicable to all Budget Module Screens:

- **HOME** key moves you to the action line
- **TAB** key moves to the next field
- **ENTER** registers your entries
- You may use the **ARROW** keys to navigate the screen
- **F8** advances you to the next page
- All entries may be updated as long as the budget is open and you have "Update" access

Entry Screens

Screen 599 – Budget Entry

1. Screen 599 will automatically default to the next fiscal year
2. Enter the SL Account + SA Account (usually "00000" unless you are specifically budgeting an SA Account)
3. Enter the budget version name
   a. Recommend using your name or initials + "1" for Phase I and "2" for Phase II.
   b. Alternatively, you may use your own methodology
4. Tab down to the category fields and enter your amounts with no decimals
5. Use **F7** & **F8** to navigate pages
6. **Submit your budget using the F11 key**
7. Once you submit your budget, *Sub Ver* will appear on the top of Screen 599 to designate the budget version that is the official, submitted version in FAMIS
8. You may update your submitted version as many times as you need to or you may create different version names, however only one version becomes the official, submitted version

Screens 560-563 – Transfer & Allocation Screens

560: GL to GL Transfers   561: GL to SL Transfers
562: SL to SL Transfers   563: SL to GL Transfers

Notes applicable to all Allocation/Transfer Screens:

- Enter a **FUNCTION CODE**:
  - A – Add Record
  - D – Delete Record
  - P – Move down a page (only available when your screen is full)
  - U – Update Record

1. Always start with the originating account (SL + SA) or (GL)
2. Screen 560 requires a campus code
3. Enter the recipient account SL + SA (usually "00000") or GL
4. Enter the amount with no decimals
5. **Mand** (Mandatory) defaults to blank (only change to **Y** if you are entering a debt service transfer)
6. Enter a meaningful description
7. Press **ENTER** to register your entries

Inquiry Screens

Screens 540 – Budget Version Inquiry

Notes applicable to the Budget Version Inquiry Screen:

- You may inquire about both current year and historical budgets
- When modifying budgets during the budget process, 540 will always present the latest, submitted version

1. Type in the SL + SA Account you are looking for
   a. if the account is not listed, there is no submitted version
   b. The Version Name of the official submitted version
   c. The Date & Time will be shown for the most recent time the submitted version was modified, including the FAMIS Userid and Name
2. Fiscal Year will default to the next fiscal year (you may change the fiscal year to see historic budgets)
3. Choose Approval Type (defaults to "C" for current, may change to "1" to see all submitted versions)
4. **TAB** down and enter "**X**" to select the account
5. The most recent submitted version will be presented
6. If more than one Approval Type is available for the account you have selected, choose:
   a. Board Approved (Phase I)
   b. Fed to FAMIS Acct
   c. Done-Board Adjusted (Phase II)
   d. Current Version
7. Once you have selected your version and approval type, you will be presented with your chosen budget on Screen 599

Screens 541 – Transfer/Allocation Inquiry

Notes applicable to the Transfer/Allocation Inquiry Screen:

- You may inquire about both current year and historical transfers/allocations
- You may see both sides of every transfer/allocation

1. Enter the Approval Type (defaults to "**C**" for Current)
2. Enter which side of the transaction you want to see (TO or FROM)
3. Enter the appropriate SL + SA or GL Account
4. Enter the Fiscal Year (defaults to the next Fiscal Year)
5. No updates can be made directly to the records shown on this screen, you must return to the original entry screens (560-563)