2021/22 Dynamic Budgets-Summarized Budget Instructions

All **must** use the Dynamic Budget system.

- If you do not have a Dynamic Budgets login, please contact Kasi Walker at 432-264-5160 or via email to request a Dynamic Budgets Access Form. This will need to be completed, a supervisor will need to approve it, and it will need to be forwarded back to Kasi Walker.
- If you need a new account/department/object code, please contact Kasi Walker at 432-264-5160 or via email. If Kasi is not available, contact Jeannie Carroll at 432-264-5603 or via email. Your administrator may contact us if preferable. San Angelo employees please contact Shane Taiclet at 325-481-8300 ext. 3263 or via email.
- In Dynamic Budgets, Under the “Budgets” tab, you will select “Enter 2022 Budget Here” which takes you to the Budget Dashboard Screen. If you do not see one of your departments/Org Units, please contact Kasi Walker via email to add to your access. You will click on the account number to take you to the Account Details tab which is where you will input your budget. Complete the Assumptions box by providing a reason for each need or request. Please provide sufficient information for your administrator. **Input the Requested Budget amount under the Aug column only.** Be sure to click on the “Save Assumptions” box and then you can click on the Dashboard tab. The Requested Budget amount will auto populate in the Blue Budget column.
- If there is a variance percentage of + or – 10%, you will need to add a comment to explain. Click on the pencil/paper icon and type your explanation in and then you will click the Submit button. This will take you back to the Dashboard. Once you click on the Search button at the top section of the screen, the comment will appear in the “Comments Displayed column.
- Do NOT input payroll or benefit accounts, even if you see them on your Budget Dashboard. Those accounts are budgeted by HR and Finance.
- Once you have completed your budget requests, click the “Edit Status” drop down and select “Submitted”. This will allow your administrator to see that your budget is ready for their review and approval. If your administrator has you make changes to what you submitted, you will need to click the “Edit Status” drop down and select “Resubmitted” when you are finished.
- Administrator’s Approval must be completed on all budgets that have been submitted. After approval, the budget requests will be locked. Please send all approved edits/changes via email to Kasi Walker and Brenda Claxton after this point.
- For the detailed instructions, please see the written instructions and/or the Budget Training Video on the HC website under Employees/Forms & Resources/Budget.

**Email Addresses:**
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