

**FY 2020 BUDGET INFORMATION  
AND  
REQUEST SYSTEM  
INSTRUCTIONS**



Office of Budget and Planning  
September 2018

# FY 2020 BUDGET INFORMATION AND REQUEST SYSTEM INSTRUCTIONS

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# Section 1: Overview

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## A general overview of the budget information and request system

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### Key Information

These instructions provide guidance for developing your unit's annual budget request for the fiscal year beginning July 1, 2019 and ending June 30, 2020 (FY 2020). This information will be used to develop Mason's amendments to the state and local budget allocations for FY 2020.

These instructions apply to non-academic Educational and General and all Auxiliary Enterprise units.

### Important Dates

<i>Date</i>	<i>Action</i>
September 25	Budget Information and Request System and Instructions available
October 30	Budget requests due
November	Budget information discussions between units and the Office of Budget and Planning as needed
December	Governor's Budget for FY 2020 available
March	Communication from the Office of Budget and Planning to units

# Section 2: FY 2020 Budget Requests

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## Details on requirements for budget request submissions

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For your FY 2020 annual budget request, you will submit your highest 1-2 priority funding needs. Budget requests must be submitted via the on-line *Budget Information and Request System* and are due by **5:00 p.m., October 30, 2018**.

### Content of a Successful Request

A successful budget request will contain the following elements:

1. *Quality* - Decision-makers may have only your description to evaluate your proposal. Thoroughly explain what the proposal involves and why the proposal should be funded. Be thorough and complete, yet concise. Provide all the narrative you think necessary to fully explain each request.
2. *Documentation* - Include any necessary supplementary documents, background information, or other material that supports your submission. Please attach the materials to the on-line submission.
3. *Completeness* - Respond to all the questions and request for information in the required format. Incomplete entries will give an error message and you will be unable to submit your request.

### Budget Request / Strategic Goals

Budget requests are limited to those necessary to meet one of Mason's strategic goals as outlined here: <https://strategicplan.gmu.edu/>. Please choose one of the following (be sure to explain how your request aligns with the items within these high level goals):

- **FOR FACULTY AND STAFF**
- **FOR STUDENTS**
- **FOR THE COMMUNITY**
- **FOR THE WORLD**

## Budget Request Guidelines

Each action or strategy proposed should address a critical issue and should be evaluated on its own merit, independently of any other proposals. Interrelated strategies or actions that cannot be viewed independently may be grouped together in one request package. Your contact in the Office of Budget and Planning (<http://budget.gmu.edu/staff-listing/>) can provide guidance if you have questions about whether to submit a request.

Your unit's FY 2020 annual budget request submission must include the following major elements.

1. Description and justification narrative – For each individual request, provide a narrative to assist decision makers in consideration of additional funding.
2. Prioritization – Please identify those requests that merit the top 1-2 highest priority for your unit.
3. Strategic Plan – Your request should be linked to strategic goals.
4. Financial Detail – personnel and non-personnel financial requirements must be detailed. ***Please note, beginning in FY 2020, any requests for new positions should also include a request for equipment formerly including in the New Faculty and Staff (NFS) program administered by ITS. The NFS program will be discontinued in FY 2020.***

# Section 3: Budget Information and Request System Access, Training, and Instructions

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Details and links to the on-line budget information and request system and instructions.

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## Access

Submit requests on-line via the Budget Information and Request System found on the Budget Office website at <https://provapps.gmu.edu/budget/Default.aspx>.

Or access the system directly via <http://budget.gmu.edu> and click on Budget Information and Request System.



## Login:

Clicking on the Budget Information and Request System will take you to the Mason Central Authentication Service (CAS) login screen where you will be asked to enter your Mason Net ID and Password. To bookmark this page for future use, press **Ctrl-D** or type in the URL <https://provapps.gmu.edu/budget/Default.aspx>.

If you believe you should have access to the system and cannot log in with your Mason credentials, please contact Jieping Li at 3-8648, or email her at [jli17@gmu.edu](mailto:jli17@gmu.edu).

## Training

One-on-one training for the Budget Information and Request System will be offered to those who need training. Please contact your budget analyst, or Jieping Li at 3-8648 or [jli17@gmu.edu](mailto:jli17@gmu.edu) to schedule training.

# System Instructions

## Menu:

After a successful login to Budget Information and Request System, you will be able to access the following menu item:

**Request Form** - Use this tab to submit new budget requests for FY 2020 as well as review budget requests that were submitted for FY 2019.

## REQUEST FORM LIST

[Add New Request](#)

[View previous year data](#)

Click the “Add New Request” to complete a new request.  
Click “View Previous Year Data” to see FY 2019 Budget Requests.

**Unit** – If you only have access to one unit, your unit will default for you. If you have more than one unit, select your unit from the drop-down list.

**Request Title** –descriptive and concise with a limit of 50 characters. There is no need to include your unit name in the request title.

**Description** – A brief paragraph describing this request, including how requested resources will be used. The opportunity to provide more detail will be an option after the initial submission.

**Respond to the Request Justification Questions** - Provide a brief paragraph answering the following questions.

- **All requests must align with Mason’s 2014-2024 Strategic Plan. Please indicate how this request helps the university reach the goals as outlined in the plan.**  
A brief statement of how this request aligns and supports Mason’ strategic goals if funded.
- **What are the measurable outcomes that will be realized if this funding is supported, and over what period of time?**  
Briefly identify the measurable outcomes that will be realized if the funding is provided.
- **What are the ramifications and alternative plans if this funding is not provided?**  
Indicate what will happen if funding is not provided for the request.
- **Is this budget request directly related to a Tier 1 enterprise risk that your unit has identified?**  
If so, which enterprise risk and action plan does this request address in full or in part. If you are unsure, please feel free to skip this question.

Fund Source:

Priority:

**Fund Source** – select one of the following fund sources from the drop-down list:

- **AE Self-Generated** – Auxiliary Enterprise self-generated is support from self-generating activity;
- **AE Student Fees** – Auxiliary Enterprise student fees is university support from student fees;
- **E&G Central** - Educational and General central funding is university support from state appropriations, tuition, or miscellaneous revenue;
- **E&G Self Supporting** – Educational and General self-supporting is support from self-generated activity;
- **Indirect** – Indirect Cost Recovery;
- **Private Funds or Other** – if support from private sources or other. If the funding for the request comes from either the *combination or other* funding sources, please provide information as to how much is from each source.

\*Please note, if your request is funded by a combination of central and self-supporting funds, please select the primary funding source and include in your description the complete anticipated funding resources.

**Priority** – rank your requests’ priority numerically. If you try to submit a request with a duplicate priority, you will be asked to reorder the priority of your requests. No alpha characters are allowed. *Please note, a priority number of 99 is held for university wide central requests and should only be used with specific direction from the Office of Budget and Planning. These requests should be limited to proposals that are being initiated on behalf of, and in partnership with, multiple departments. Proposals that do not fit such criteria will not be considered.*

**Category** – Mason’s priorities for FY 2020 support the goals listed in the university’s 2014-2024 strategic plan. Specifically the priorities should be linked to one of the goals found on page 4 of these instructions.

Further detailed description for each goal can be found in:

<https://strategicplan.gmu.edu/>

**If the request generates revenue, please check the box and attach a file with additional revenue details.**



**Funding Request Information** - Enter dollars needed to support the request. Please use salary dollars and FTE for all personnel categories. The fringe benefits will calculate automatically. Do not use a comma separator or dollar sign when entering dollar values.

Enter Funding request information (fringe amounts will be calculated **automatically**)

FTE Positions	Head Count	FTE	Amt	Fringe Amt	Total Amt
FT Faculty		<input type="text"/>	<input type="text"/>	\$0	\$0
PT Faculty	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0
Grad Assts	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0
Admin Faculty		<input type="text"/>	<input type="text"/>	\$0	\$0
Classified		<input type="text"/>	<input type="text"/>	\$0	\$0
<b>Other Ongoing Adjustments</b>					
Wages			<input type="text"/>	\$0	\$0
Direct Expenditures					<input type="text" value="\$1,000"/>
Briefly describe how the ongoing direct expenditure funds will be used:					
<input type="text"/>					
<b>One-time Funding</b>					
Wage			<input type="text"/>	\$0	\$0
Other Direct Expenditures					<input type="text" value="\$0"/>
<b>Total</b>		<b>0</b>			<b>\$1,000</b>

For one-time special funding, use the section provided.

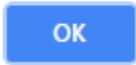
**Request Total** – The system will calculate a total based on the values you provided.

You can now select one of the following options:

- **Save for Later** will allow you to save your request in Draft form.
- **Submit Request Form** will allow you to formally submit your Budget Request Form.

When your request has been successfully submitted, you will receive this message:

Your Budget Request Form was submitted successfully.



Please note: You will be able to print your requests once they are either saved or submitted. You will receive error messages if you do not answer all questions or provide incorrect data for FTE or salaries. Please contact your budget analyst (<http://budget.gmu.edu/staff-listing/>) or Jieping Li if you have problems submitting your requests.

If you decide you wish to delete a request that is in a draft or submitted state, or wish to make changes to a request previously submitted, please contact Jieping Li or Barbara Clark.