The Budget Revision team met to review current policies, practices, and processes related to paper-based Finance budget revisions (excluding grants and regular position-related budget revisions); improve the Finance budget revision process, maximizing existing technology to the extent possible. Expand training and documentation.

**Redesign Banner Finance and HR Security Access Form:**
- Added role definitions to the form
- Consolidated three forms into one request form

**Standardized Budget Revision Forms (BD02 / BD04):**
- Renamed forms for ease of identification and use
- Created new on-line revision forms
- Forms auto populates with department information when UUID entered
- Forms auto populates with FOAP information when index entered
- Paper Forms that should be created in Self-Service Banner will be returned

**New Budget Revision Webpage Created:**
- Information pertaining to Budget Revisions have been consolidated to one page
- Forms are linked directly from the web page
- Instructions how to complete the BD02 and BD04 forms available on webpage

**Banner Finance - New Role Class**
- Created New Banner Role – Budget Transfer Limited Access. Allows an individual appointed by a financial manager to act on his/her behalf to create budget transfers only with no access to financial reports in Banner or e-Print, and no approval authority

**Training Materials Updated:**
- PowerPoint materials updated to reflect new forms and give examples
- Updated with information how department users request access in order to transfer funds between orgs
- Financial Planning will continue to offer face-to-face training sessions

**Improved Process Creating New Approval Queues:**
- Kim Josh worked with ITD to improve process creating new approval queues. A two hour process was reduced to 30 minutes

**Future Recommendations:**

**Updates to current Financial Planning internal database:**
- Financial planning has plans to enhancement their internal database. Team suggests that the paper revision forms be replaced with a on-line web form with electronic departmental routing queues. When form is submitted record will be written to the database, eliminating Financial Planning staff manually entering the transaction
- Ability to create the paper routing form that requires approval from AVP Finance, VP Finance, President and Director of Financial Planning with online approval signatures. Will eliminate several handoffs of paper forms, dual data entry, maintaining log sheets
- Provide access to department users in order to look-up their revision status
Training made available on-line using technology:

- Financial Planning will work with BFSS to create on-line training using technology for delivery. This will provide training for new employees and as a refresher

Remove reference to “Spectrum”

- New employees are confused with the reference to “Spectrum” on websites, training materials and documentation. Team recommends BFSS and accounting review and remove references

Ask TOM entries:

- Financial Planning work with BFSS to add entries to ‘Ask TOM’ on common questions