What was supposed to happen?

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.

What actually happened?

- New web and Excel based budget revision forms were designed.
- The Financial Planning website was updated with a Budget Revision link for easy access to forms and instructions.
- Information sessions were held to inform the campus community about the changes.

What went well that we need to continue?

- Updates to the website have made information easier to find. Financial Planning will continue to revise the website and add more information.

What might need to be tweaked?

- Currently, Financial Planning is receiving three different formats of the budget revision (old version, new Excel version and web version). This does create some additional work on the Financial Planning staff. Financial Planning is looking at options to streamline this new process in our department.
- Continue to develop training and website updates to increase knowledge on campus about the budget revision process.