Budget Preparation Process

Centrally Supported Units

The Budget Office conducts a concurrent dialog.

Timeframe	Actors	Step
Before the budget preparation season begins	Area / Prep File Users	1. Verify the budget hierarchy. ▪ All nodes are present and match internal process. 2. Verify that security profiles align with the hierarchy and support internal process. ▪ Refer to Security Forms in case of corrections or updates. 3. Communicate the start of internal processes and start change readiness activities.
Mid-April to July	Reviewers and end users	4. Login to NUPlans and verify role, data, and version security. 5. Perform adjunct budgeting tasks (such as commitments or appropriations), as applicable. 6. Review chart strings and perform maintenance, as necessary. 7. Budget all assigned nodes. 8. Communicate with Budget Analysts throughout. a. Areas with Distributed Budgeting obtain first level of support from Area Budget Analysts. b. Areas with Centralized Budgeting obtain first level of support from Budget Office.
May to July	Reviewers and end users	9. Upon completion, end users submit child budget groupings to reviewers. 10. Reviewers may conduct departmental reviews. 11. Reviewers submit parent budget groupings to Area Approvers.
June - July	Reviewers and Area Approvers	12. Areas review and approve (or reject) budgets. 13. Reviewers or Area Approvers may create V3 from approved prior versions. 14. Areas submit Prep Files to Budget Office and specify the version from which V4 should be created. The choice of version should be consistent within the area.
July	Budget Office	15. Creates V4 from specified prior version and hands off approved base budgets to NIT.

Concurrent Dialog

Budget Office announces appropriations and other aspects of the budget model. Areas respond to appropriations per internal process and priorities and may distribute appropriations, if applicable.

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Self-Supporting Units

The Budget Office conducts a concurrent dialog.

Timeframe	Actors	Step
Before the budget preparation season begins	Area/ Prep File Users	1. Verify the hierarchy of budget groupings. ▪ All nodes are present and match internal process. 2. Verify that security profiles align with the hierarchy and support internal processes. ▪ Refer to Security Forms in case of corrections or updates. 3. Communicate the start of internal processes and start change readiness activities.
Mid-April to July	Reviewers and end users	4. Login to NUPlans and verify role, data, and version security. 5. Negotiate commitments and transfers, as applicable. 6. Review chart strings and perform maintenance, as necessary. 7. Budget all assigned nodes. 8. Communicate with the Area Budget Analyst throughout.
May to July	Reviewers and end users	9. Upon completion, end users submit child budget groupings to reviewers. 10. Reviewers may conduct departmental reviews. 11. Reviewers submit parent budget groupings to Area Finance.
July	Area	12. Reviews and approves (or rejects) budgets. 13. Creates V3 from approved prior versions. 14. Submits V3 of Prep Files to Budget Office.
July	Budget Office	15. Creates V4 from V3 and hands off approved base budgets to NUIT.

Concurrent Dialog

Budget Office conducts a dialog about aspects of the budget model.

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