ENGAGE BUDGET SUBMISSION GUIDE

FY21 (2020-2021)

Your Budget will be divided into four main sections: Fall 2020, Spring 2021, Dual Semester, and Admin & Registration Funds. Please review the SA Finances 101 PowerPoint before creating your budget request.

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**Step 1:** To access the budget submission form, select the “Finance” tool from your Org’s Tools menu. (Screenshot 1)

**Step 2:** Once you are in the “Finance” section, select the blue “Create New Request” button and then select “Create Budget Request”. (Screenshot 2)

**Step 3:** You want to select the “**FY21 2021 (2020-2021) SA Funds**” process to start completing the budget form. Once you start your budget proposal you can save and return later but you cannot delete the proposal once started. (Screenshot 3)
Step 4: Title your budget “SA Budget Proposal (2020-2021)”. In the description box below, provide a summary of the overall budget proposal you are submitting. You will have opportunities later in the budget form to provide more detailed descriptions tied directly to the funds you are requesting. (Screenshot 4)

Step 5: Your Budget will be organized into four main categories, they are Fall 2020, Spring 2021, Dual Semester, and Admin & Registration. The next four pages consist of questions related to the events and items you are requesting funds for. Each page will consist of 3-5 questions for each of the four Budget categories. (Screenshot 5)

Step 6: After you have completed the questions on the prior four pages you will now start to populate your proposal with the events and line items you are requesting. On the next page you will see the four main sections of your budget Fall 2020, Spring 2021, Dual Semester, and Admin & Registrations. (Screenshot 6)
Step 6A: To create your first event/budget section click on the blue budget section title “Fall 2020 SA Funds” (Screenshot 6) and proceed to change the name to a title that represents the event. When naming, follow this example to keep the sections clearly identifiable: Fall 2020 (Event Name Here). (Screenshot 7)

Step 6B: To add Line Items to your newly created event/budget section click “Add Item” button (Screenshot 6). Once you do this the following screen will ask you to enter your line items, Screenshot 8. Complete the form to add the expense line to the section.

When adding line items to your budget do not enter each individual item that you need to purchase, ie. balloons, streamers, costumes, etc. Instead group similar items together into one line item for the event, ex. Decorations and supplies, and provide the details of what you plan to purchase and why they are important to the event in the description box. Submitting line items this way will result in easier accounting and submission of request.
Once you complete this form click “SAVE” and add more line items if necessary. After you have added a few line items to the event/budget section, your budget look like Screenshot 9 (Your event/budget section title followed by a numbered list of line items). If your line items look like Screenshot 10, please go back and redo your line items and group them accordingly. Line items submitted like this will get less support than those submitted as instructed.
Step 6C: Once you have added all the line items for that particular event you can add more events to that section of the budget by clicking “Another ‘Fall 2020 SA Funds’ Section” button.

Repeat Steps 6A-C for the other applicable sections of the budget.

Some examples on how to utilize the Admin and Registration Funds section of the budget can be found in Screenshots 11-14.
**Step 7:** Submit your Budget Proposal

If you have any questions about the process, email the SA Finance Committee at gwsafinance@gmail.com.