PROGRAM PORTAL BUDGET TAB DIRECTIONS

Only the program director and those assigned by the program director and given Program Admin roles can enter/see budget data.

At the start of the program's fiscal year (FY) the "Program Budget" tab is to be updated to reflect the source of the budget assigned to the program and approved budget detail for the upcoming FY. The budget detail reflects the approved budget as assigned to the program per fiscal year and does not need to be updated or edited like a balance sheet as the budget is spent. However, if the budget allocation to the program changes as a result of a change in fiscal support, the budget tab must be updated to reflect those changes.

At a minimum, the budget detail must include the following, regardless of whether they are included in the PA Program budget or within another departmental or institutional budget:

a) Faculty salaries and benefits for the total number of positions budgeted.
b) Staff salaries and benefits for the total number of positions budgeted.
c) Faculty development (Funding provided to the program director and principal faculty in support of maintenance of certification, licensure, and professional development directly relevant to PA education).
d) Operations (daily operating expenses such as copying, telephone, postage, office supplies, books, software, etc.) The program budget less salaries and benefits.

Please be aware that you cannot enter the same line item twice.
You can filter the program budget detail by campus.

To enter the Source of Budget Assigned to the Program

- Under **Source of Budget Assigned to Program**, click **New**. An empty line appears.
- Use the drop-down arrow to the right of the field and then scroll down to select the line item you want and enter the amount.
- If you find the line item you need is not listed, select **other revenue (specify below)** from the drop-down box. A new field appears.
- Enter the description of the line item and the amount.
- Click **Save** when you are finished.

To enter Program Budget Detail

- Under **Program Budget Detail**, click **New**. An empty line appears.
- Use the drop-down arrow to the right of the field and scroll down to select the line item you want and enter the amount in the **Amount** field.

- If the line item you need is not listed, select **other expenses (specify below)** from the drop-down box. A new field appears.
- Enter the description of the line item and the amount.

- Under the **Campuses** section, select the campus(es) that uses the line item. Enter the amount of the line item allocated to each campus. **Note:** The sum of amounts entered for each campus must equal the total amount entered in the line-item **Amount** field. For example, if $50,000 was entered as the line-item amount, and the program has two campuses, the amounts entered for the two campuses could be combinations such as $20,000 and $30,000, $10,000 and $40,000, $0 and $50,000, etc. If the sum does not add up correctly, a warning symbol will be displayed next to **Campuses.** When the allocation is correct, a check appears.
- Click **Save** when you're finished.

DELETE/EDIT Line Items

- Click on Edit to make corrections or change the amount of a line item.
- Click Delete to remove line items.

FILTER BY CAMPUS

- In the Filter by Campus field, select the drop-down arrow.
- Select the campus for which you want to view budget detail.
- Click **Close.** The list is filtered by campus.

You can also **export the budget information to Excel** by clicking on the button found in the lower right-hand corner of the tab.
Be sure the Budget Tab is **correct and up to date** before exporting your budget information into a report or into the Program Data Sheet.