



Update Budget options

Table of Contents

Update Budget options i

Update Budget options

Verify that you are logged on to file ID N when performing this step.

[Budget > Tables > District Budget Options](#)

Set up the necessary parameters associated with preparing next year's budget.

Note: 61XX accounts and amounts are not displayed in the **Requested** column.

The cutoff date fields are optional and may vary depending on the LEA's operations.

Tables > District Budget Options Budget

Save

BUDGET OPTIONS

Retrieve Print

School Year: 2026-2027

Requested Cutoff Date: 06-15-2026

Recommended Cutoff Date: 07-15-2026

Approved Cutoff Date: 08-31-2026

Capture Original Budget Flag:

Set up budget options:

School Year	Type the starting year and ending year. The field is only for informational purposes and is displayed on some reports.
Requested Cutoff Date	Type the date that the budget requests must be submitted in the MM-DD-YYYY format. When this date is less than the current date, those using the Requested column will no longer be able to make changes to accounts or amounts.
Recommended Cutoff Date	Type the date that the district recommendations for the new budget must be submitted to the board for review in the MM-DD-YYYY format. When this date is less than the current date, those using the Recommended column will no longer be able to make changes to accounts or amounts.
Approved Cutoff Date	Type the date that the board approval of the budget is required in the MM-DD-YYYY format. When this date is less than the current date, those using the Approved column will no longer be able to make changes to accounts or amounts.
Capture Original Budget Flag	<p>Select the field to update the original budget amount and the appropriations/estimated revenue amount.</p> <p>The Capture Original Budget Flag field works in conjunction with the Move Budget to Finance utility. The Full Amount or the Difference options on the Move Budget to Finance utility determine if this field is selected.</p> <p>If Capture Original Budget Flag is selected, only the original budget is moved. If Capture Original Budget Flag is not selected, transactions entered will update the appropriations/estimated revenue amount only.</p>

Click **Save**.

Use one of the following options to verify the changes:

- Verify that the 2026-2027 column headings are accurate by using the [Budget > Inquiry > Budget Account Codes Inquiry](#) and clicking **Retrieve**.
- Verify that the 2026-2027 fiscal year corresponds to file ID N in the upper-right corner of the page.

Year:



TIP: Before continuing to step 8, **it is recommended** that you run and print the [Budget Account Codes Inquiry](#) as it will be needed for verification purposes in step 9.