



Update Budget options

Table of Contents

| | | |
|------------------------------|-------|---|
| Update Budget options | | i |
|------------------------------|-------|---|

[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.

The screenshot shows a software interface for managing budget options. At the top, there is a green header bar with a home icon, the text 'Tables > District Budget Options', and a 'Budget' dropdown menu with a grid icon. Below the header is a 'Save' button. The main area is titled 'BUDGET OPTIONS' in green. It contains several input fields and buttons: 'Retrieve' and 'Print' buttons, and five input fields for dates: 'School Year' (2025-2026), 'Requested Cutoff Date' (06-15-2025), 'Recommended Cutoff Date' (07-15-2025), 'Approved Cutoff Date' (08-31-2025), and a checkbox for 'Capture Original Budget Flag' which is checked.

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 2020-2021 column headings are accurate by using the [Budget > Inquiry > Budget Account Codes Inquiry](#) and clicking **Retrieve**.
- Verify that the 2021-2022 fiscal year corresponds to file ID N in the upper-right corner of the page.

Year: **N 2022-2023** 

0 2019 - 2020
1 2020 - 2021
2 2021 - 2022
3 2012 - 2013
4 2013 - 2014
5 2014 - 2015
6 2015 - 2016
7 2016 - 2017
8 2017 - 2018
9 2018 - 2019
N 2022 - 2023

Apply **Cancel**



Before continuing to the next step, it is recommended that you run and print the **Budget Account Codes Inquiry** as it will be needed for verification purposes in step 9.