

Update Budget options

2025/12/06 12:44 i Update Budget options

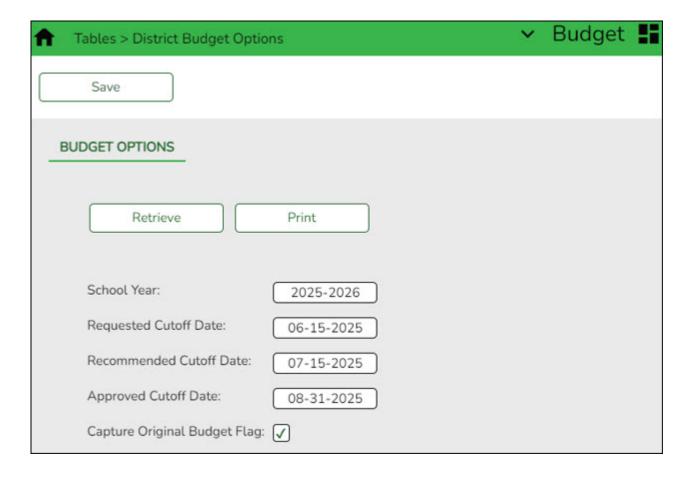
Table of Contents

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.



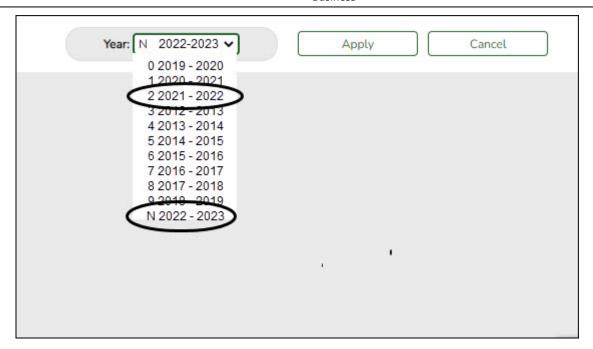
Set up budget options:

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	Select the field to update the original budget amount and the appropriations/estimated revenue amount.
	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.
	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.

☐ Click **Save**.

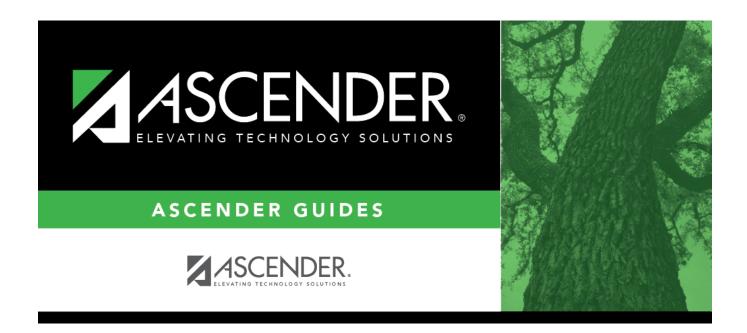
☐ Use one of the following options to verify the changes:

- 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.





TIP: 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.



Back Cover