University of Houston ⌐ Clear Lake

Planning and Budget

The Budget Request Form will be used for any requests in the current fiscal year for budget-related items.

The Form is located on the Office of Planning and Budget website under Resources and Forms/Forms.

1. To begin, assign a unique name for the Budget Request.
2. Every request will need to have an uploaded file for backup – explained later in this document. Please name that backup file the same as the unique name in #1.

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1. Provide a Unique name for this request
   *

This same name will be used for the uploaded supporting documentation.

   [Enter your answer]

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3. Select the appropriate type of request from the 3 choices:

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2. Planning and Budget request for: *
Select One:

○ Restore Prior Year BBA

○ One-time need for current year

○ Position Gap Funding

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4. If Position Gap Funding is selected – the 3 extra questions in the form will be required as shown below.

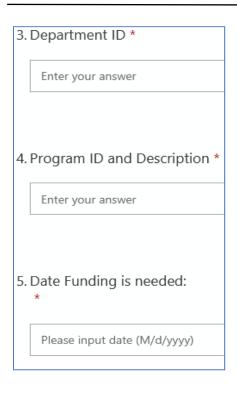   The next questions will then begin under instruction 5.

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3. Enter Position Number
   *
   .

   [Enter your answer]

4. Enter Position Title
   *

   [Enter your answer]

5. Enter Employee ID

   [Enter your answer]

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5. If Restore Prior Year BBA or One-time need options are selected, required data beings by entering the Department ID:

   a. Enter the Department ID (CXXXX) of the requesting area
   b. Enter the Program ID (from the cost center) and the Description
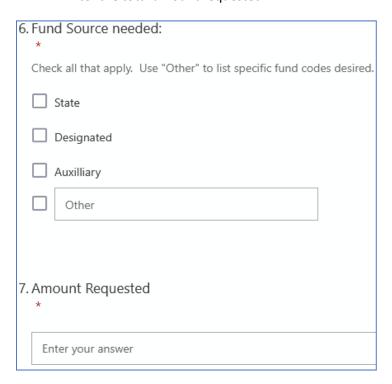   c. Enter the Date the funding is needed

3. Department ID *

Enter your answer

4. Program ID and Description *

Enter your answer

5. Date Funding is needed:
   *

Please input date (M/d/yyyy)

6. Enter the Fund source requested and if there is a specific fund code for an already established cost center, enter that detail in the "Other" field.
7. Enter the total amount requested.

6. Fund Source needed:
   *
   Check all that apply. Use "Other" to list specific fund codes desired.

   ☐ State

   ☐ Designated

   ☐ Auxilliary

   ☐ Other

7. Amount Requested
   *

Enter your answer

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8.   Enter all other comments needed to be sent to the Planning and Budget office for consideration of the request.

> 8. Provide any other comments needed for analysis for funding:
>
> Enter your answer

9.   Upload one file with all required documentation for the request. Combine all forms, e-mails, spreadsheets, etc. into one file for upload and name the file the same name entered in the first form field.

> 9. Upload approval documents
> (Non-anonymous question ⓘ)   *
>
> Name this documentation with the same used for this request in item 2. all approvals for new dollars, new initiatives, new positions in one file.
>
> ↑   Upload file
>
> File number limit: 1   Single file size limit: 1GB   Allowed file types: Word,Excel,PPT,PDF,Image,Video,Audio

Required Documents include:

- o   Restore Prior Year BBA:

    - ▪   Attach the 1063 Budget Summary report for previous year period 998.

- o   One-time need for current year:

    - ▪   Attach the Fund Equity by Dept (016) report as well as justification for not using departmental budget or equity funds.

- o   Position Gap Funding:

    - ▪   Attach the confirmation e-mail from HR showing the approval for hire or reclassification that includes the compensation rate.

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10. Enter the full name of the Department Head making the request and the Business Administrator.

10. Department Head
    *

    Enter your answer

11. Business Administrator
    *

    Enter your answer

☐ Send me an email receipt of my responses

Submit

Check the box to have your responses e-mailed to the requestor.

Click the Submit button to enter the form into Workflow.

This form will be sent automatically to Planning and Budget.
Please allow one week for review.
When a decision is made – the requestor will receive an e-mail if the form has been approved or not.