SLCC Informed Budget Process (IBP) Guidelines

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The Informed Budget Process (IBP) guidelines provide direction in navigating the electronic budget request submission in the IBP Portal. It is highly recommended that you review these guidelines prior to entering data and submitting requests. The instructions are as follows:
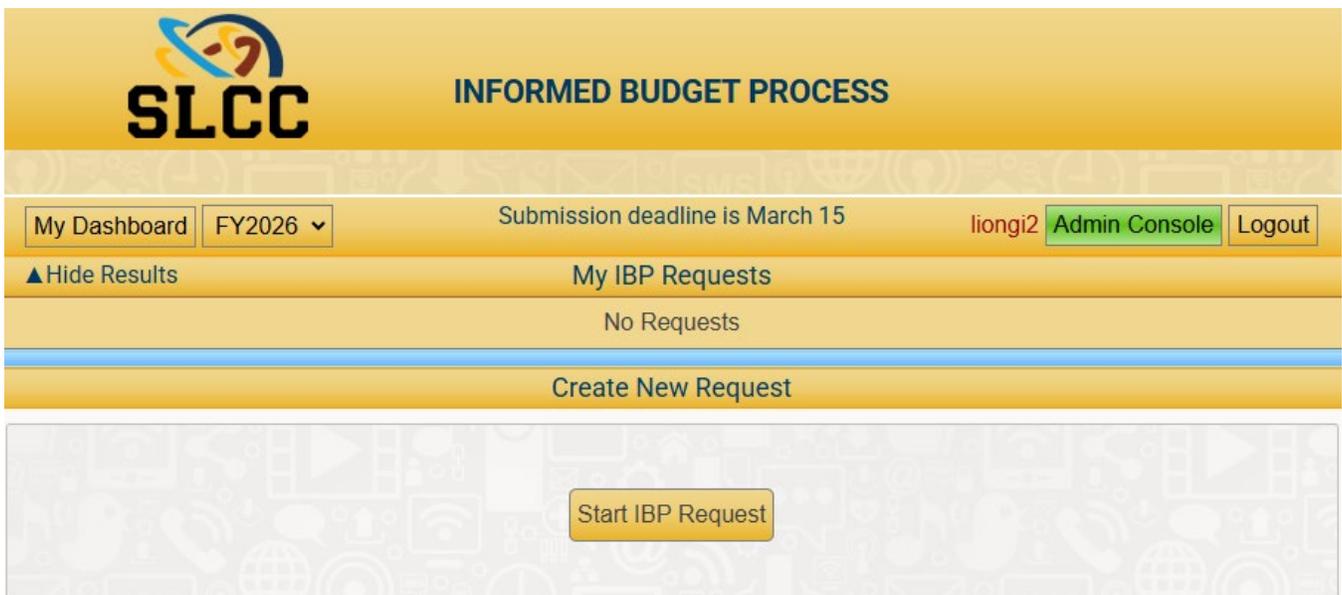
IBP Portal Website: https://webforms.slcc.edu/IBP/login.aspx

Login Screen: Use your MySLCC username and password to access the form.

My Dashboard Screen: The dashboard is where you begin a new budget request or manage your existing requests.

Existing requests will show on the Dashboard screen only after you have entered information either in draft or final submission phase.

- The fiscal year always defaults to the **upcoming** fiscal year. The upcoming year is when new funding may be available for your IBP request(s) being currently submitted.

- Once a request has been saved in draft form or final submission, hovering the cursor over each request title will show the request number and the person who saved or submitted the request.

- Requests that have been saved as a draft can be edited until submitted as final by clicking the Edit button on the left of the request.

- Requests that are submitted as final can only be viewed (not edited) by clicking the View button on the left of the request.

- All draft and submitted requests can be deleted at any time by clicking the Delete button on the right of the request.

- IBP requests have the following status indicators on the Dashboard.

IBP Request Status Indicator Legend	
EDIT	Saved as Draft
VIEW	Submitted (not editable)
VIEW	Prioritized by your Cabinet member
✕ VIEW	Not Approved
★ VIEW	Division Approved & Funded *Work with your VP's/Provost's office*
★ VIEW	IBP Approved & Funded (less than $50,000)
★ VIEW AddRpt	IBP Approved & Funded ($50,000 or more) *Accountability Reports required for 2 years*

To create a new request, select Start IBP Request at the bottom of My Dashboard.

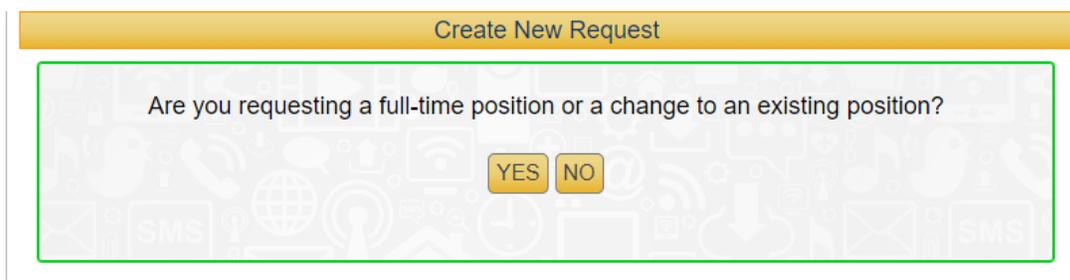Create New Request

Start IBP Request

Guidelines to the IBP Funding Request Form

1. The IBP form can be saved as a draft for later editing and submission.

2. Please be advised that the IBP form will **automatically log out after 30 minutes of no activity**. It is recommended that you complete filling out the form in one sitting or <u>save your work as a draft</u> often to avoid losing your data.

3. If you have been working on or have completed narrative for your IBP request in an external document (emails, Word documents, etc.), simply copy and paste that narrative in the respective data field.

4. Each budget request title is limited to 60 characters, including spaces.

5. The IBP form has the autofill function for the Program/Office/Area and Person/Title fields to improve data entry consistency. This will allow you to directly type in the first few letters and select your area or name from the drop-down list.

6. Please complete all data fields that are required on the forms. Use the "Tab" key or your mouse and cursor to navigate through the form. All green highlighted fields are non-editable. These fields will populate automatically if dollars are requested for salaries and/or wages. Also, built into the web-based IBP form is a benefit and current expense calculator for NEW full-time and hourly position requests. The detail behind the calculations can be found in Appendix A to these guidelines.

7. If desired, requests can be printed after being saved as a draft or submitted as final. However, it is optional and not necessary to print because they are accessible through My Dashboard.

8. As you proceed through the IBP electronic process, please respond to the prompts in order to advance to the next page. After responding to the series of prompts, you will reach the IBP request form.

The prompts are as follows:

First Prompt –Full -Time Position: This prompt asks whether you are requesting a full-time position or a change to an existing position. **Note:** if you are not requesting a new full-time position or a change to an existing position, respond "No" and it will automatically advance you to the third prompt.

Second Prompt – Position Created in PARS: If you answered "Yes" to the first prompt to request a new full-time position or upgrade to an existing position, it will need to be entered into PARS **before** continuing.
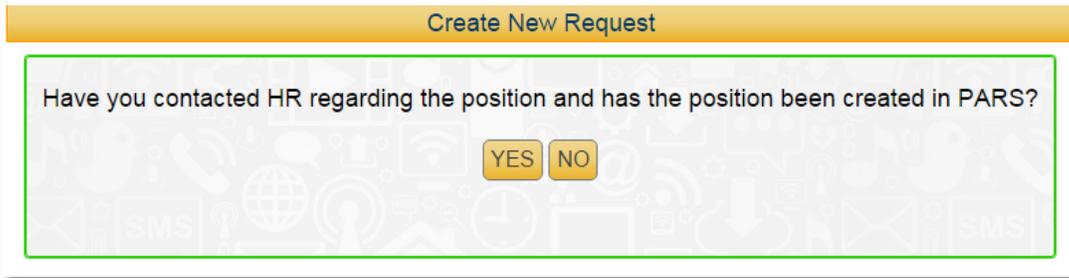
If you have not worked with HR regarding this new position or upgrade to an existing position, respond "No"; the following screen will pop up and you can either click on the "Hr Employment" link to be routed to PARS or "Start Over".

Third Prompt – Facilities Related Projects: This prompt asks whether you are requesting a Facilities related project and gives details of what a project entails.

Note: If you are not requesting a Facilities related project, respond "No" and it will automatically advance you to the fifth prompt.

Fourth Prompt – Receive a cost estimate from Facilities: If you responded "Yes" to the third prompt to request a Facilities related project, i.e. the remodel of a space, or the purchase of furniture, etc., you will need to consult with the Facilities Services Planning & Design Division to address both the feasibility and budget of your proposal. Please do so **well in advance** of any deadlines for submittals.

Create New Request

Have you contacted Facilities and received a cost estimate?

YES NO

If you have not worked with the Facilities Services Planning & Design Department regarding your project, respond "No", and you'll be routed to a prompt that has a link ("facilities-space-needs-request") to the required PDF to submit a project-related request.

Download and email the completed form to: planningdesign@slcc.edu

Create New Request

Please consult with the Facilities Services Planning & Design Department by submitting the following form to planningdesign@slcc.edu:
facilities-space-needs-request

START OVER

Fifth Prompt – Software Advisement: Any new software proposals require a completed OIT software request form prior to consideration. You can access the form here: Technology Request Form

Create New Request

Does this request include the need to purchase software?

If 'YES', you need to complete the software request form

CONTINUE

IBP Request Submission

Please select your Division _(Vice President/Provost level)_, your Department _(Associate or Assistant Vice President/Dean level)_, the Funding Source _(E&G/Fund 10000 or SLTC/Fund 24200)_, and the Type of Request for the form to populate. When New Position, Position Funding Change, or Position Upgrade is selected, the form will show three sections: Full-time Positions, Hourly Support, and Non-Personnel Budget. When Other is selected, the form will only show two sections: Hourly Support and Non-Personnel Budget.

New Position: is to request a brand new, non-existing position. The position must have been evaluated and given a salary range by HR through PARS. FTE always defaults to 1. The associated benefits will be calculated automatically based on the salary amount entered.

Required Resources					
New Full-Time Positions (Base Request Only)					
	FTE	HR Approved Title	Total Salary	Benefits & Other	Total
Faculty 1	1		0	0	0
Faculty 2	1		0	0	0
Staff 1	1		0	0	0
Staff 2	1		0	0	0
Staff 3	1		0	0	0
					$0

Salary Related Benefits (SRB)	28.5%
Summer Contract Pool Formula	23.5% Salary + SRB
Health Benefit Package	$18,000
Current Expense	$1,000
Technology Cost	$500

Position Funding Change: is to request a funding change for an existing position from self-generated funding sources or grants and contracts to E&G. A funding change can be requested for full FTE or partial FTE. Please change the FTE accordingly. The requested amounts will include an estimated increase to salary and benefit costs. Please work with Lynn Miller (x4229) before proceeding.

Required Resources					
Full-Time Position Funding Change (Base Request Only)					
	FTE	HR Approved Title	Req. Salary	Req. Benefits	Total
Faculty 1	1		0	0	0
Faculty 2	1		0	0	0
Staff 1	1		0	0	0
Staff 2	1		0	0	0
Staff 3	1		0	0	0
					$0

The requested amounts will include an estimated increase to salary and benefit costs. Please work with Lynn Miller (x4229) before proceeding.

Position Upgrade: is to request an upgrade to an existing position. The upgrade must have been evaluated and given upgraded salary and benefit amounts by HR through PARS. A Position Upgrade can be requested for a full or partial E&G funded position. Please change the FTE accordingly. Please use the actual position benefit amount provided by the Budget Office under the Budget Comments section in PARS. Contact Lynn Miller (x4229), if needed.

Required Resources					
Full-Time Position Upgrade (Base Request Only)					
	FTE	HR Approved Title	Req. Salary	Req. Benefits	Total
Faculty 1	1		0	0	0
Faculty 2	1		0	0	0
Staff 1	1		0	0	0
Staff 2	1		0	0	0
Staff 3	1		0	0	0
					$0

Please use the actual position benefit amount provided by the Budget Office under the Budget Comments section in PARS. Contact Lynn Miller (x4229) if needed.

Other: is to request Hourly and Non-Personnel Support dollars only. *The Index* and *By June 30* are required fields, please make sure they are filled in or selected before saving or submitting the request.

Hourly Teaching and Non-Teaching Support				
	Index*	Total Wages	Benefits	Total
Teaching		0	0	
Non-Teaching		0	0	
				$0

Hourly Benefits   10%
* If a new index is needed, enter "NEW". If approved, follow normal protocol for requesting a new index.

Non-Personnel Budget Support				
	Index*	Base Request	One-time Request	By Jun 30**
Current Expense		0	0	Select
Travel		0	0	Select
Equipment		0	0	Select
Remodel (one-time only)			0	Select
		$0	$0	

* If a new index is needed, enter "NEW". If approved, follow normal protocol for requesting a new index.
** One-time requests only: If approved, can it be spent or encumbered by June 30th of the current fiscal year?

A request is only successfully saved or submitted when one of the following messages appears at the top of the request after clicking "Save Draft" or "Submit Final". If neither of those messages appears, there are missing data fields in the form. Make sure to fill out all required fields before saving or submitting.

Successful! The Operational Request was submitted to DRAFT state. Request number is 1738. Optionally, you may print this page for future reference.

You are currently viewing Operational Request 1738 Optionally, you may print this page for future reference.

IBP Results

After the SLCC Executive Cabinet has prioritized and approved IBP Requests, results will be posted in the IBP portal. Requestors will also receive an email for each approved or not approved request.

Result of approved requests, including dollar amounts, accountability report requirements, and admin notes (if any), can be viewed in the IBP portal by clicking the Result button on the right of each request.

Appendix A

Calculation Examples on the IBP Form

Once the user inputs the salary amount for a faculty or staff member on the IBP form, the total benefits and other costs will auto-populate based on the calculation formulas as shown in the detailed examples below. The calculator assigned to each new full-time position includes: a full benefits package; a departmental current expense adjustment; technology expense adjustment; and a summer contract for faculty positions. The calculator for hourly requests only includes 10% hourly benefits.

		Faculty - Salaried Benefits & Other Cost Calculations	
1	Salary – Faculty		$50,000.00
2	Salary Related Benefits (SRB) = 28.5% * $50,000		14,250.00
3	Summer Contract Pool = (23.5% * $50,000) + (28.5% * $11,750)		15,098.75
4	Health Benefit Package		18,000.00
5	Current Expense		1,000.00
6	Technology Cost		500.00
		Total Benefits & Other Costs	48,848.75
		Total	***$98,848.75***

		Staff - Salaried Benefits & Other Cost Calculations	
1	Salary - Staff		$50,000.00
2	Salary Related Benefits (SRB) = 28.5% * $50,000		14,250.00
3	Summer Contract Pool		N/A
4	Health Benefit Package		18,000.00
5	Current Expense		1,000.00
6	Technology Cost		500.00
		Total Benefits & Other Costs	$33,750.00
		Total	***$83,750.00***

		Hourly Benefits & Other Cost Calculations	
1	Total Wages		$30,000.00
2	Hourly Related Benefits = 10%		3,000.00
		Total	***$33,000.00***