

SLCC Informed Budget Process (IBP) Guidelines

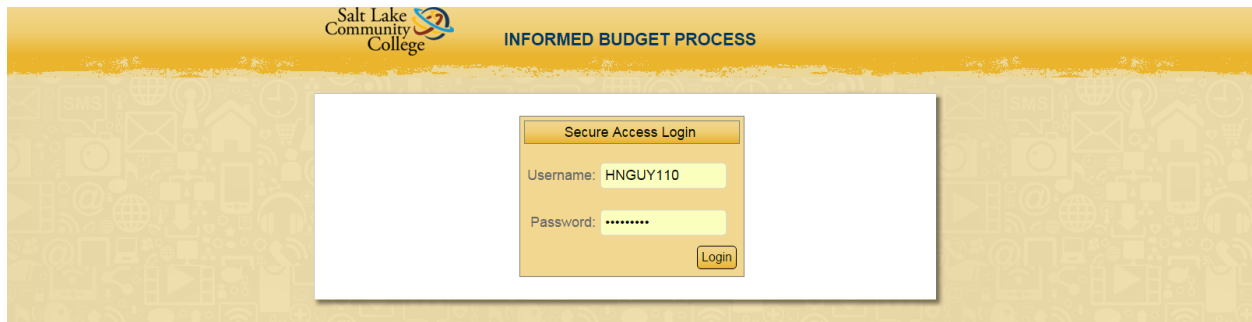
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Jillana AhLoe, Budget Director

Beginning FY2023, the IBP portal has the capability to display requests on both the submitter's and the requestor's dashboards if they are two different individuals. However, all system-generated notification emails about the request will only go to the requestor. Please make sure to follow the instructions below to enter the requestor's username in order for the portal to function correctly.

If a copy of an old IBP request from FY2021 or prior is needed, please contact Luisa Iongi at x4243 or Luisa.Iongi@slcc.edu.

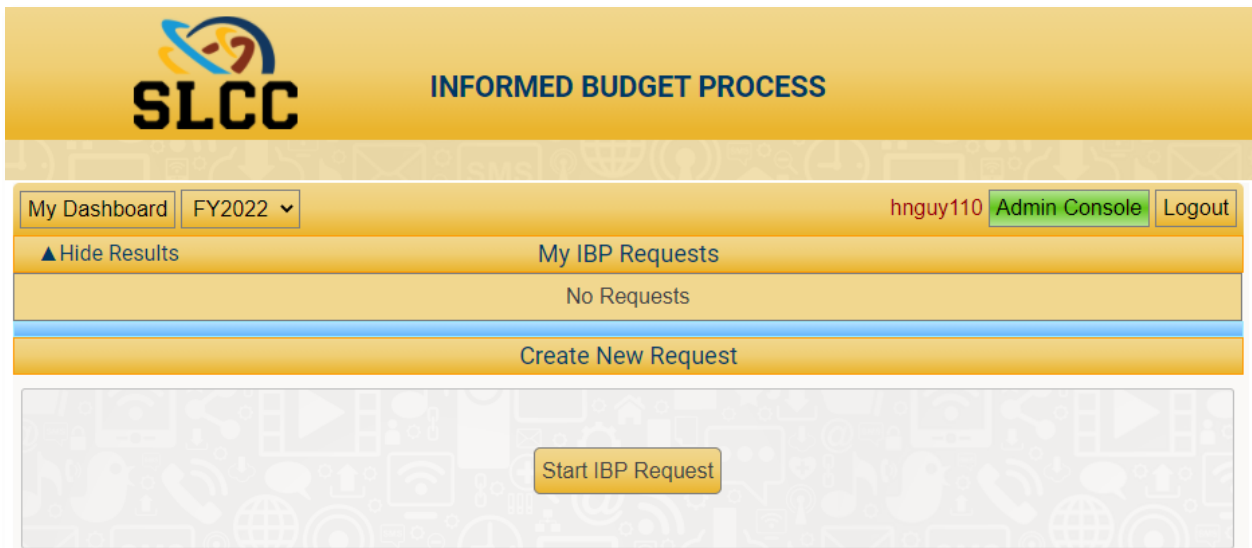
The IBP guidelines provide direction in navigating the electronic budget request submission in the IBP Portal. It is highly recommended that you review these guidelines prior to entering data and submitting requests. The instructions are as follows:

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



The screenshot shows the login interface for the SLCC Informed Budget Process. At the top left is the Salt Lake Community College logo. The header text reads "INFORMED BUDGET PROCESS". The main content area features a "Secure Access Login" box with the following fields: "Username: HNGUY110" and "Password:". A "Login" button is located at the bottom right of the login box.

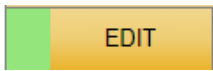





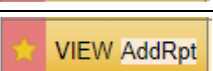
My Dashboard Screen: The dashboard is where you begin a new budget request or manage your existing requests.



The screenshot displays the user's dashboard. The header includes the SLCC logo and "INFORMED BUDGET PROCESS". Below the header, there is a navigation bar with "My Dashboard" and "FY2022" (with a dropdown arrow). On the right side of the navigation bar, the user's name "hnguy110" is displayed, along with "Admin Console" and "Logout" buttons. The main content area shows "My IBP Requests" with a "▲ Hide Results" link and the text "No Requests". Below this, there is a "Create New Request" button. At the bottom of the dashboard, there is a large "Start IBP Request" button.

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	
	Saved as Draft
	Submitted (not editable)
	Prioritized by your Cabinet member
	Not Approved
	Division Approved & Funded <i>*Work with your VP's/Provost's office</i>
	IBP Approved & Funded (less than \$50,000)
	IBP Approved & Funded (\$50,000 or more) <i>*Accountability Reports required for 2 years</i>

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

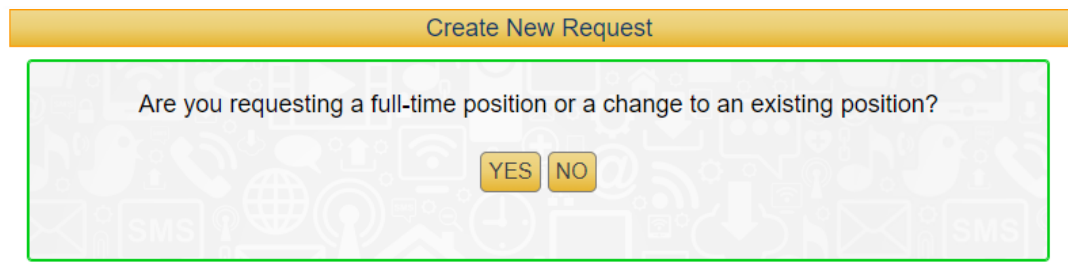
Guidelines to the IBP Funding Request Form

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 save your work as a draft 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.

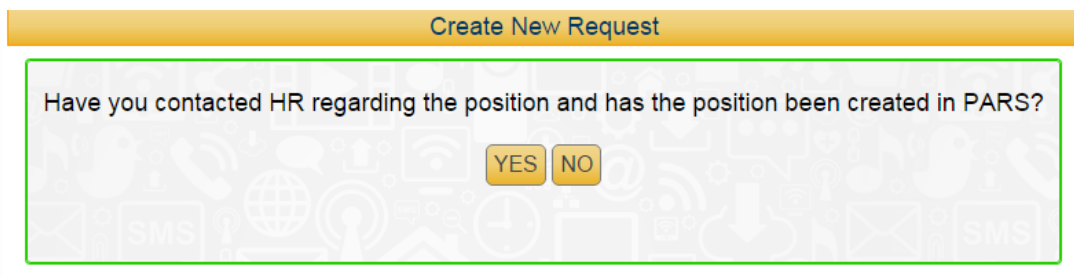
The prompts are as follows:

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.



The screenshot shows a yellow header bar with the text "Create New Request". Below it is a white box with a green border containing the question "Are you requesting a full-time position or a change to an existing position?". At the bottom of the box are two yellow buttons labeled "YES" and "NO".

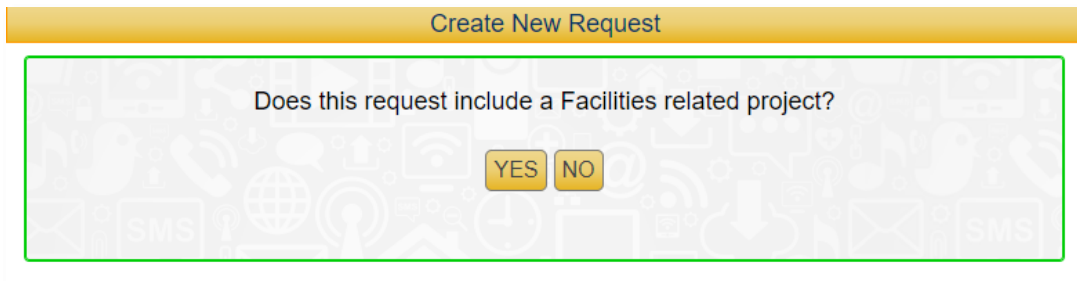
Second Prompt – Position Created in PARS: If you answered “Yes” to the first prompt to request a new full-time position or upgrade to an existing position, it will need to be entered into PARS **before** continuing. If you have not already done so, please work with Marni Fisher (ext. 4812) in HR to complete this step. When working with HR, please indicate that it is an IBP FY 2022 request. HR will determine the correct salary, grade and title to be applied to staff position requests. For all faculty requests, academic departments will need to work with James Broadbent (ext. 4672) in HR.



The screenshot shows a yellow header bar with the text "Create New Request". Below it is a white box with a green border containing the question "Have you contacted HR regarding the position and has the position been created in PARS?". At the bottom of the box are two yellow buttons labeled "YES" and "NO".

If you have not worked with HR regarding this new position or upgrade to an existing position, respond “No”; however, you will be unable to proceed to enter data on the IBP form at this time.

Third Prompt – Facilities Related Projects: This prompt asks whether you are requesting a Facilities related project. **Note:** If you are not requesting a Facilities related project, respond “No” and it will automatically advance you to the fifth prompt.

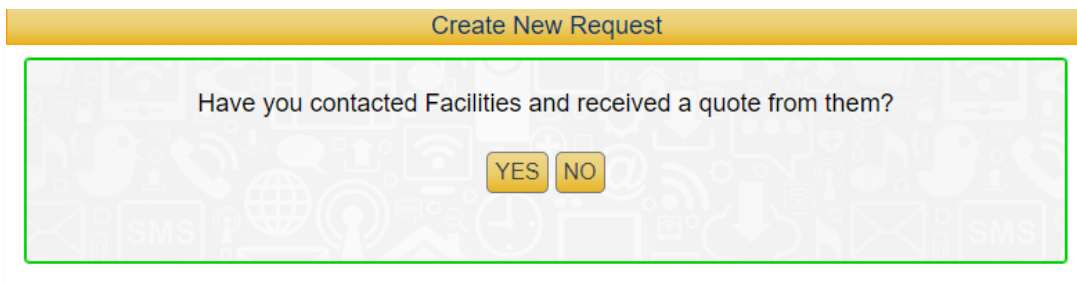


The screenshot shows a yellow header bar with the text "Create New Request". Below it is a white box with a green border containing the question "Does this request include a Facilities related project?". At the bottom of the box are two yellow buttons labeled "YES" and "NO".

Fourth Prompt – Consult with the Facilities Services Planning & Design Division: 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, 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.

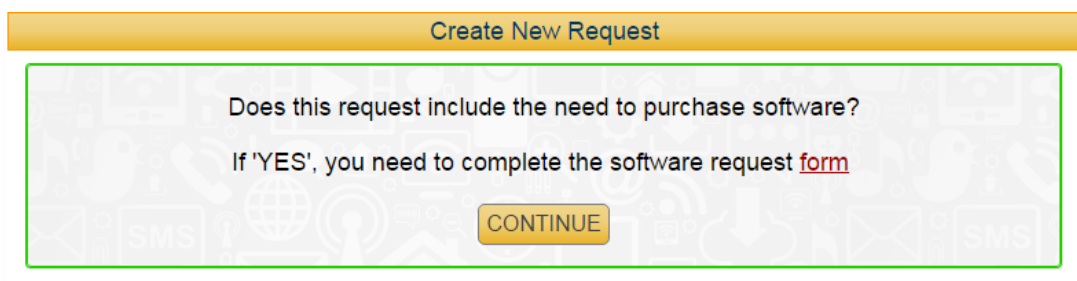
If you have not worked with the Facilities Services Planning & Design Division regarding your project, respond “No”; however, you will be unable to proceed to enter data on the IBP form at this time.

Contact Jessica Davenport at jessica.davenport@slcc.edu to schedule a time to meet in order to discuss these types of projects.



The screenshot shows a yellow header bar with the text "Create New Request". Below it is a white box with a green border containing the question "Have you contacted Facilities and received a quote from them?". At the bottom of the box are two yellow buttons labeled "YES" and "NO".

Fifth Prompt – Software Advisement: Any new software proposals require a completed OIT software request form prior to consideration.



The screenshot shows a yellow header bar with the text "Create New Request". Below it is a white box with a green border containing the question "Does this request include the need to purchase software?". Below the question is the text "If 'YES', you need to complete the software request [form](#)". At the bottom of the box is a yellow button labeled "CONTINUE".

IBP Request Submission

The screenshot shows the top portion of the 'IBP Funding Request' form. At the top left, there are links for 'My Dashboard' and a dropdown for 'FY2023'. At the top right, the user 'hnguy110' is logged in, with a 'Logout' button. The main title 'IBP Funding Request' is centered. Below this is a blue header for the 'Division and Type of Request' section. It contains three dropdown menus: 'Please Select Division', 'Please Select Department', and 'Please Select Funding source', each with an asterisk indicating it is required. Below the dropdowns, there is a section for 'Full-time Positions Request (Base Request Only)' with four radio button options: 'New Position', 'Position Funding Change', 'Position Upgrade', and 'Other'.

Please select your Division (Vice President/Provost level), your Department (Associate or Assistant Vice President/Dean level), the Funding Source (E&G or SAT), 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.

This screenshot shows the input fields for the IBP Funding Request form. The fields are: 'Request Title *', 'Program/Office/Area *', 'Requested By (Person / Title) *', 'Requestor's username (If different than submitter's)', and 'Reason for Request *'. The 'Requestor's username' field is highlighted with a red box, and a red arrow points from a text box at the bottom to this field. The text box contains the instruction: 'Make sure to fill out this field if the submitter and the requestor are different.' At the bottom right of the form, it says 'Characters Remaining 5000'.

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 benefit 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	<input type="text"/>	0	0	0
Faculty 2	1	<input type="text"/>	0	0	0
Staff 1	1	<input type="text"/>	0	0	0
Staff 2	1	<input type="text"/>	0	0	0
Staff 3	1	<input type="text"/>	0	0	0
					\$0
Salary Related Benefits (SRB)			26.0%		
Summer Contract Pool Formula			23.5% Salary + SRB		
Health Benefit Package			\$17,000		
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 Arlene Ray (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	<input type="text"/>	0	0	0
Faculty 2	1	<input type="text"/>	0	0	0
Staff 1	1	<input type="text"/>	0	0	0
Staff 2	1	<input type="text"/>	0	0	0
Staff 3	1	<input type="text"/>	0	0	0
					\$0
The requested amounts will include an estimated increase to salary and benefit costs. Please work with Arlene Ray (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 Arlene Ray (x4229), if needed.

Required Resources					
Full-Time Position Upgrade (Base Request Only)					
	FTE	HR Approved Title	Req. Salary	Req. Benefits	Total
Faculty 1	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Faculty 2	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Staff 1	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Staff 2	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Staff 3	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
					\$0

Please use the actual position benefit amount provided by the Budget Office under the Budget Comments section in PARS. Contact Arlene Ray (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 or selected before saving or submitting the request.

Required Resources				
Hourly Teaching and Non-Teaching Support				
	Index*	Total Wages	Benefits	Total
Teaching	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>
Non-Teaching	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>
				\$0

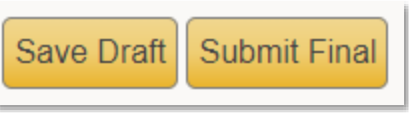
Hourly Benefits 10%

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

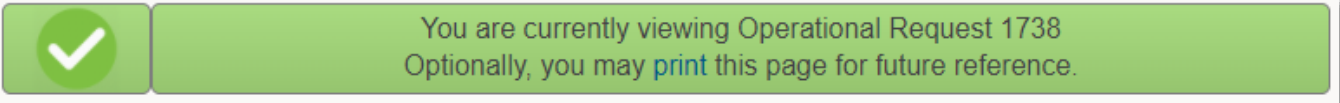
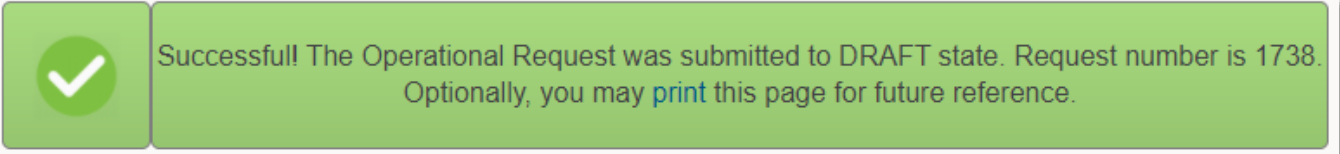
Non-Personnel Budget Support				
	Index*	Base Request	One-time Request	By Jun 30**
Current Expense	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Select <input type="button" value="v"/>
Travel	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Select <input type="button" value="v"/>
Equipment	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Select <input type="button" value="v"/>
Remodel (one-time only)	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Select <input type="button" value="v"/>
		\$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.



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.

<i>Faculty - Salaried Benefits & Other Cost Calculations</i>		
1	Salary – Faculty	\$50,000.00
2	Salary Related Benefits (SRB) = 26.0% * \$50,000	13,000.00
3	Summer Contract Pool = (23.5% * \$50,000) + (26.0% * \$13,000)	14,805.00
4	Health Benefit Package	17,000.00
5	Current Expense	1,000.00
6	Technology Cost	500.00
	Total Benefits & Other Costs	46,305.00
	<i>Total</i>	<i>\$96,305.00</i>

<i>Staff - Salaried Benefits & Other Cost Calculations</i>		
1	Salary - Staff	\$50,000.00
2	Salary Related Benefits (SRB) = 26% * \$50,000	13,000.00
3	Summer Contract Pool	N/A
4	Health Benefit Package	17,000.00
5	Current Expense	1,000.00
6	Technology Cost	500.00
	Total Benefits & Other Costs	\$31,500.00
	<i>Total</i>	<i>\$81,500.00</i>

<i>Hourly Benefits & Other Cost Calculations</i>		
1	Total Wages	\$30,000.00
2	Hourly Related Benefits = 10%	3,000.00
	<i>Total</i>	<i>\$33,000.00</i>