

Budget and Planning Process

Tentative Schedule

FY 2019-20

Updated: December 6, 2018

Note: All dates are subject to change.

DATE	DESCRIPTION
January (mid) – February (mid)	Budget model information posted and College/Unit data review period
January 15	Base Budget Adjustment edocs completed and approved in KFS
January 28	Initial load into Longview Budget Planning System
January 30 - 31	Board of Trustees meeting
February (early)	Planning assumptions posted
February 4	Longview Budget Planning System open to College Level Users
February 7	Long term pool estimated income loaded
February 8	Longview Budget Planning System open to Department Level Users
February 12 - 20	Campus training and review sessions of Longview Budget Planning System
March (early)	Budget Letters distributed
March 4	SIP eligibility set in Longview Budget Planning System
March 4	D-Level exact close date communicated by C-Level UBOG member of each College/Unit to their departments
March 25	Longview Budget Planning System planning modules closed to College Level Users
March (late)	Staff market pay analyses delivered to organizations (From Compensation Services, OHR, report available in Workday)
April 2	Organizational budget narrative and financial report due to Budget Office
April 9 - 12	Trustee Budget FY20 roll up completed
April 19 - 24	Submit SIP Templates to Budget Office
May 1	SIP closed to all users
May 3	May Book completed for BOT mailing
May 23 - 24	Board of Trustees meet to approve operating budget and capital plan
June 10	Trustee Budget snapshot set in Longview
June 12 - 14	On request to Budget Office, Longview Budget Planning System planning module open to College Level Users

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FY 2019-20

Updated: November 30, 2018

Note: All dates are subject to change.

DATE	DESCRIPTION
June 14	Close Longview Budget Planning System to all level users @ 9pm
June 17 -18	*Individual incumbent (workforce) planning records updated to include SIP Awards, SIP Apply
June 19 - 25	Longview Budget Planning System planning modules reopened to College level users for final balancing of accounts
June 18 tentative	SIP Awards loaded to Workday HR, awards are effective July 1
June 25	UBO begins final budget review
July 24	FY20 Budget loaded to general ledger

* Dates are subject to change based on business process deadlines.