

# Budget and Planning Process

## Tentative Schedule

**FY 2020-21**

Updated: March 18, 2020

*Note: All dates are subject to change.*

<b>DATE</b>	<b>DESCRIPTION</b>
January 15	Base Budget Adjustment edocs completed and approved in KFS
Jan 29 – Feb 1	Board of Trustees meeting
February 5	In-year forecast due
February 6	Initial load into Longview Budget Planning System
February (early)	Planning assumptions posted
February 10	Longview Budget Planning System open to <b>College Level Users</b>
February 10 - 12	Long term pool estimated income loaded
February 10 - 19	Campus training and review sessions of Longview Budget Planning System
February 17	Longview Budget Planning System open to <b>Department Level Users</b>
March 2	SIP eligibility set in Longview Budget Planning System
March 2 - 16	Budget model information posted and College/Unit data review period
March 4	D-Level exact close date communicated by C-Level UBOG member of each College/Unit to their departments
March (mid)	Budget Letters distributed
April 3	Longview Budget Planning System planning modules closed to <b>College Level Users</b>
April 6 - 10	Trustee Budget FY21 roll up completed
April 10	Organizational budget narrative due to Budget Office
April 20 - 24	Submit SIP Templates to Budget Office
May 1	SIP closed to all users
May 4	May Book completed for BOT mailing
May 22 - 23	Board of Trustees meet to approve operating budget and capital plan
June 9	Trustee Budget snapshot set in Longview
June 11 - 12	On request to Budget Office, Longview Budget Planning System planning module open to <b>College Level Users</b>

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<b>DATE</b>	<b>DESCRIPTION</b>
June 12	Close Longview Budget Planning System to <b>all level users @ 9pm</b>
June 16 tentative	SIP Awards loaded to Workday HR, awards are effective July 1
June 16 -17	*Individual incumbent (workforce) planning records updated to include SIP Awards, SIP Apply
June 18 - 25	Longview Budget Planning System planning modules reopened, <b>@ noon</b> , to College level users for <b>Final Balancing</b> of accounts
June 26	UBO begins final budget review
July 24	FY21 Budget loaded to general ledger

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