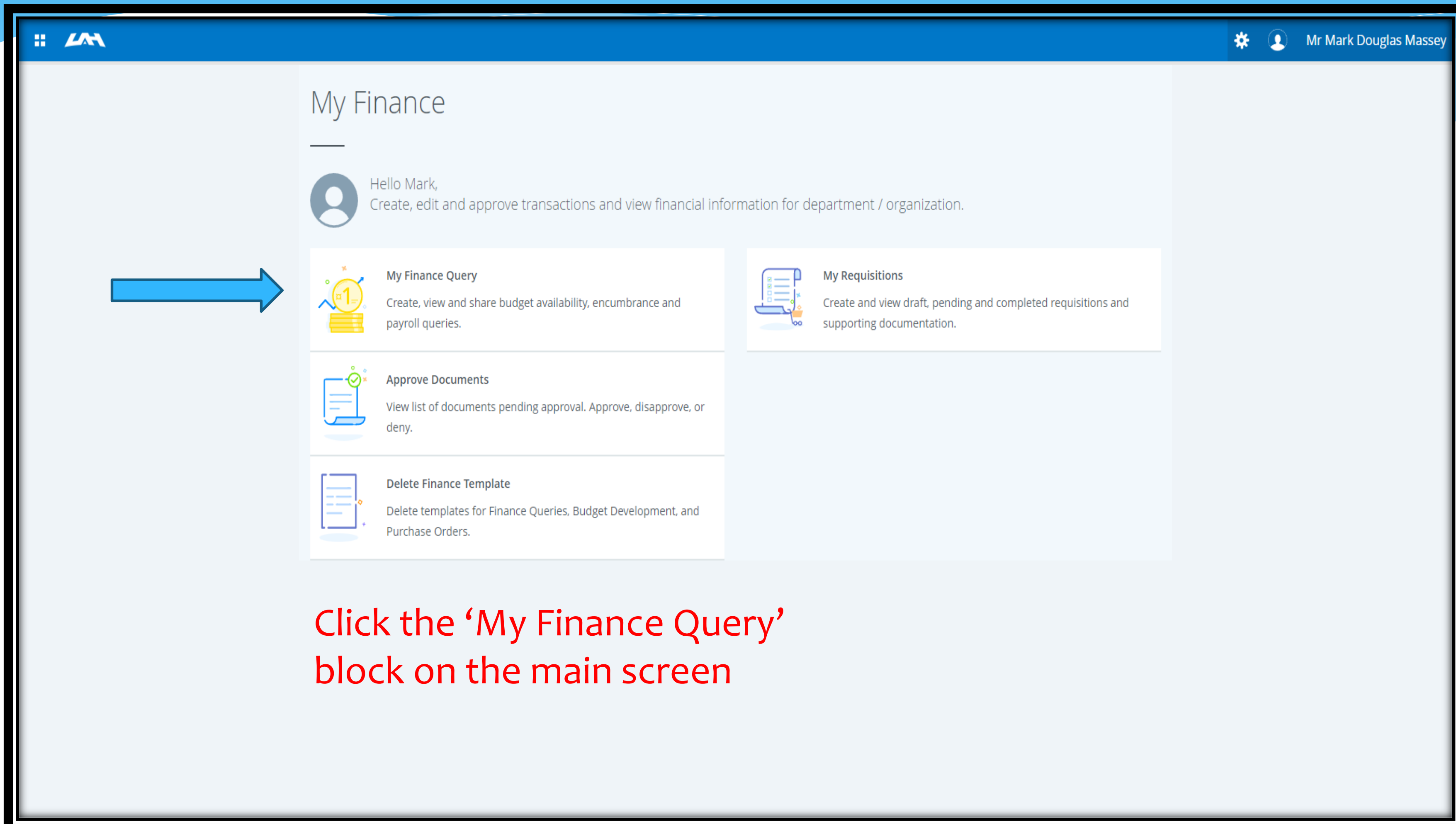
Budget Office Training

My Finance Self-Service

Budget Status by Account:

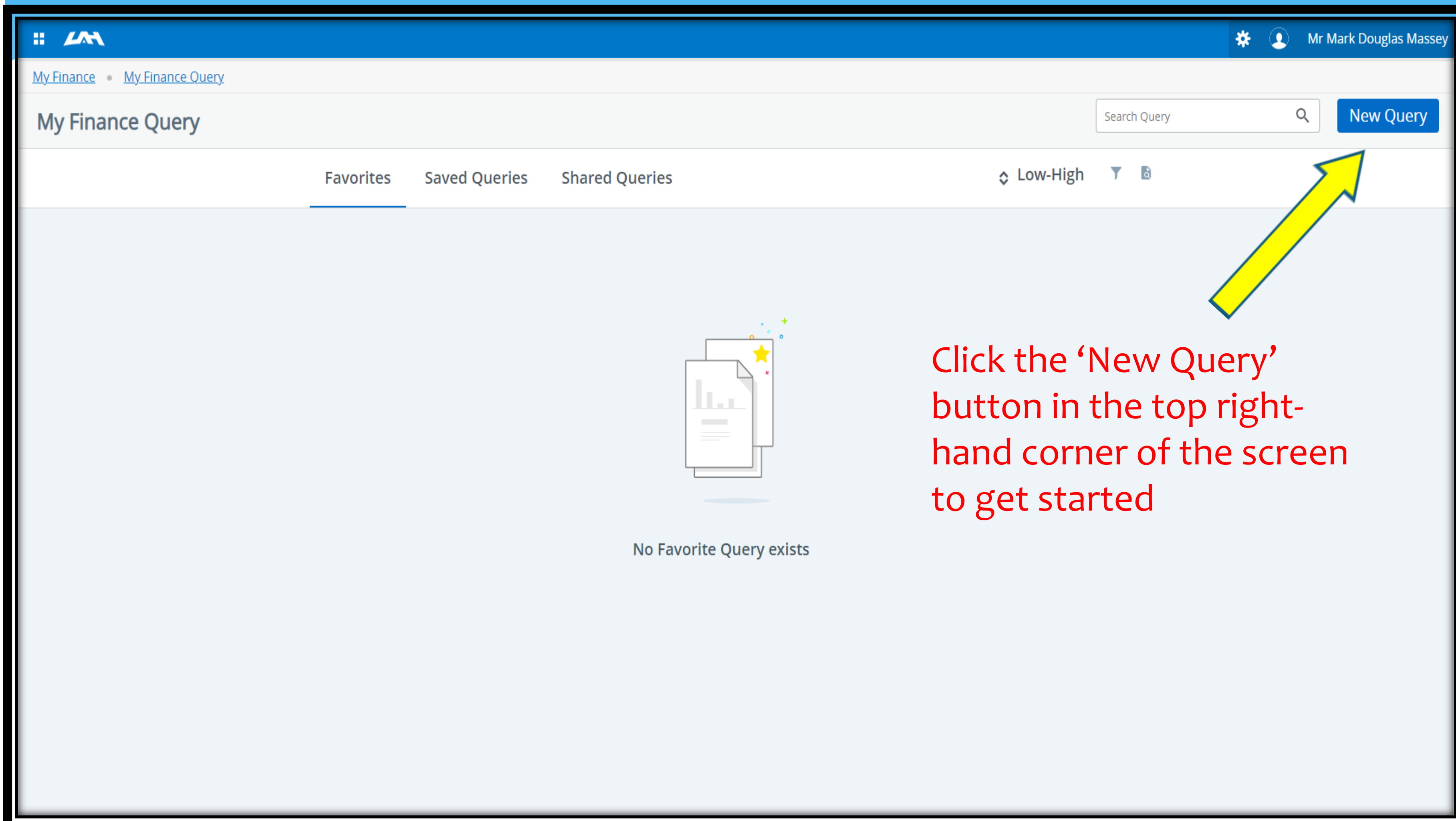
Finding Revenues

My Finance
Budget Status by Account Query-Revenues



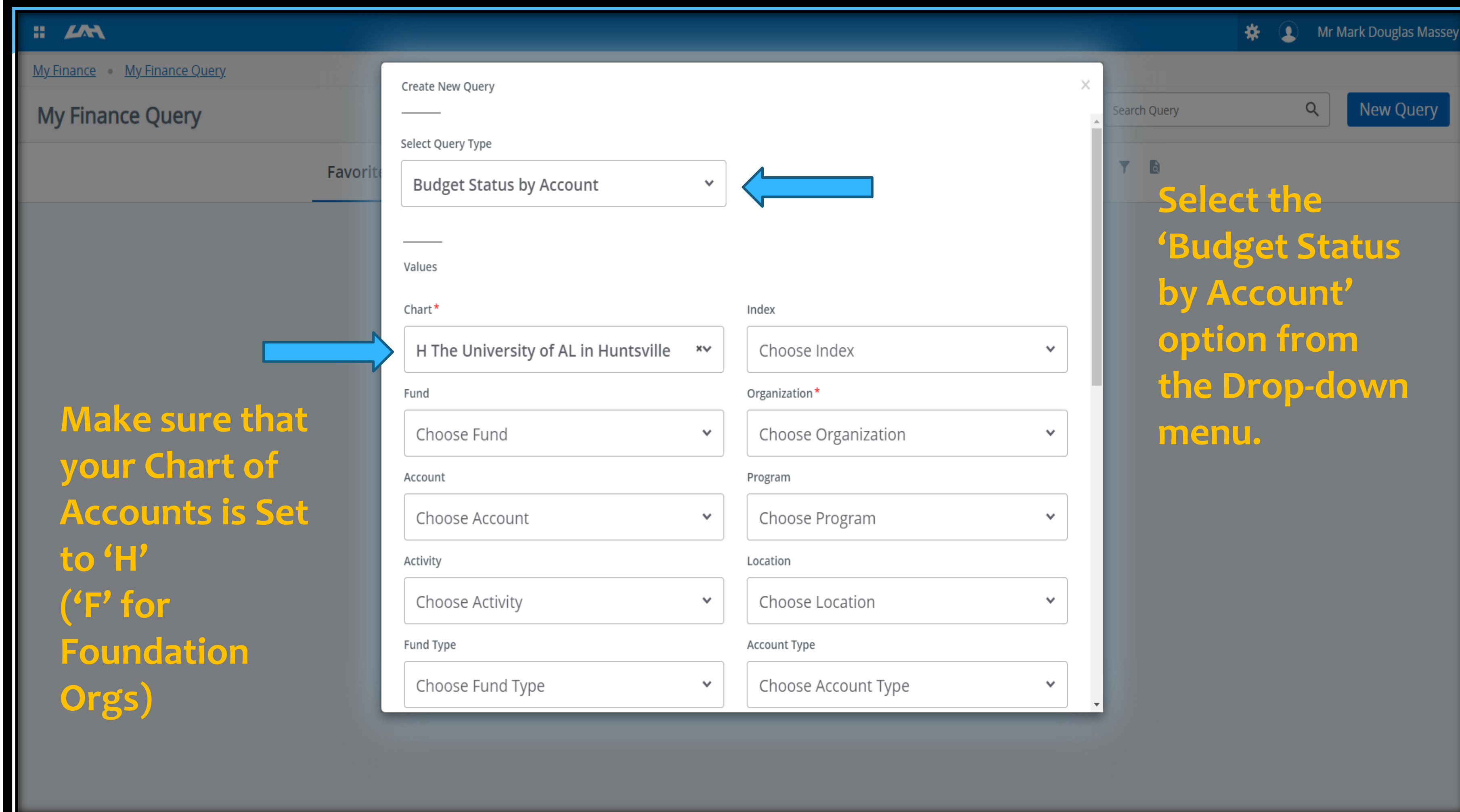
Click the ‘My Finance Query’ block on the main screen

My Finance
Budget Status by Account Query-Revenues



Click the ‘New Query’ button in the top right-hand corner of the screen to get started

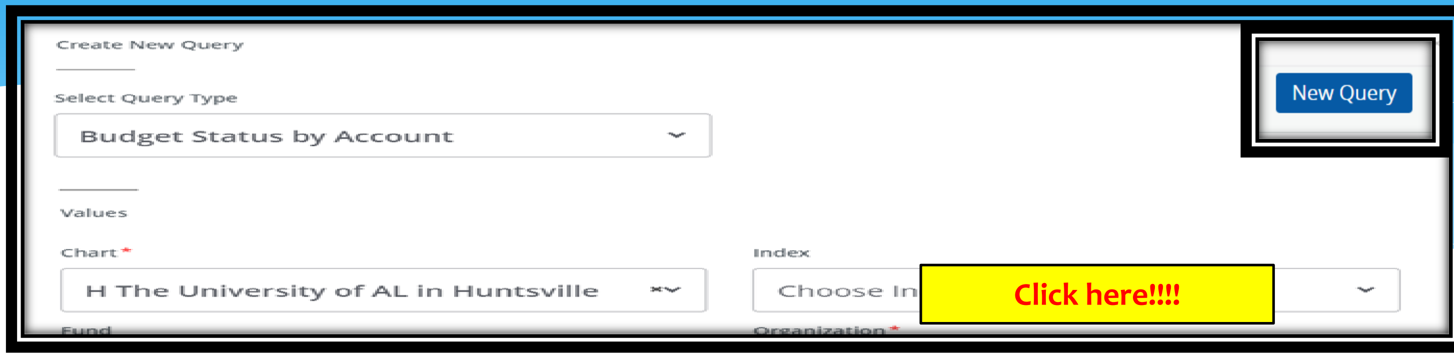
My Finance
Budget Status by Account Query-Revenues



Select the ‘Budget Status by Account’ option from the Drop-down menu.

Make sure that your Chart of Accounts is Set to ‘H’ (‘F’ for Foundation Orgs)

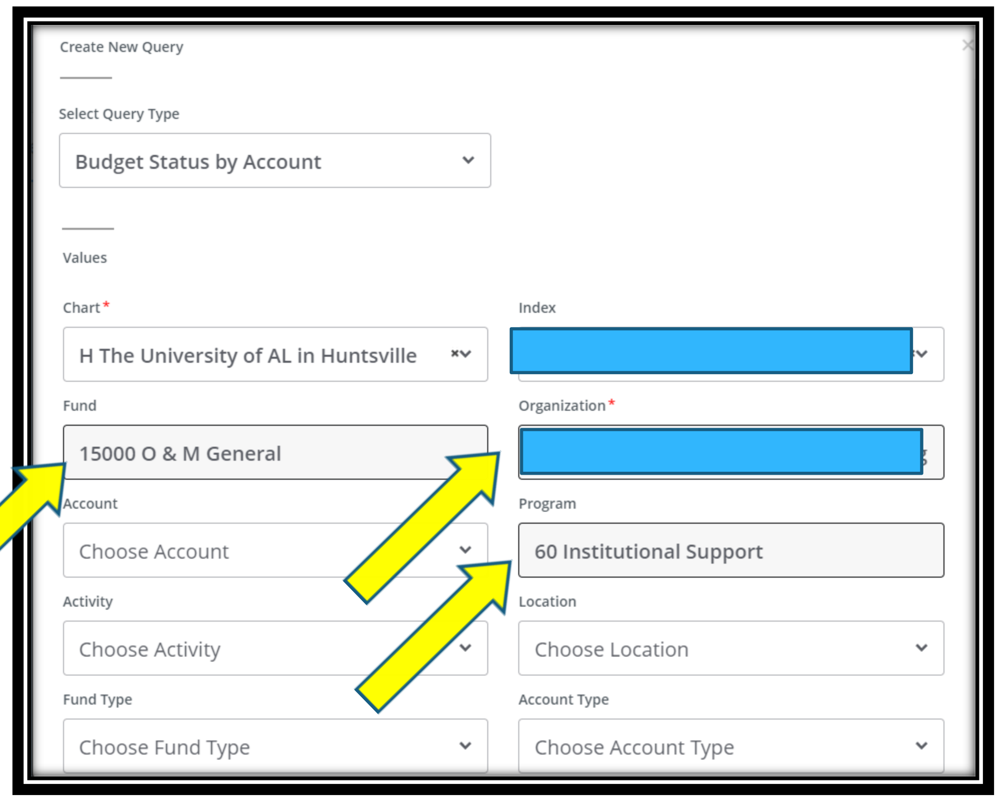
My Finance
Budget Status by Account Query-Revenues



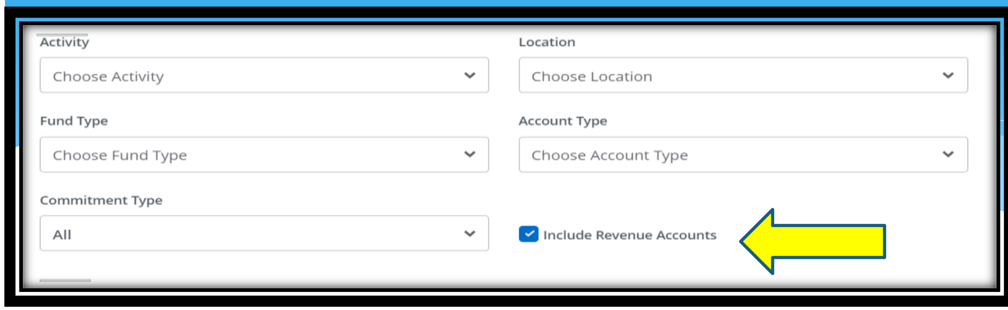
First, enter the 6-digit 'Index Number' ('Organization Number', 'Org Code', or just 'Org')

When you do, these fields will auto-populate as seen on the right:

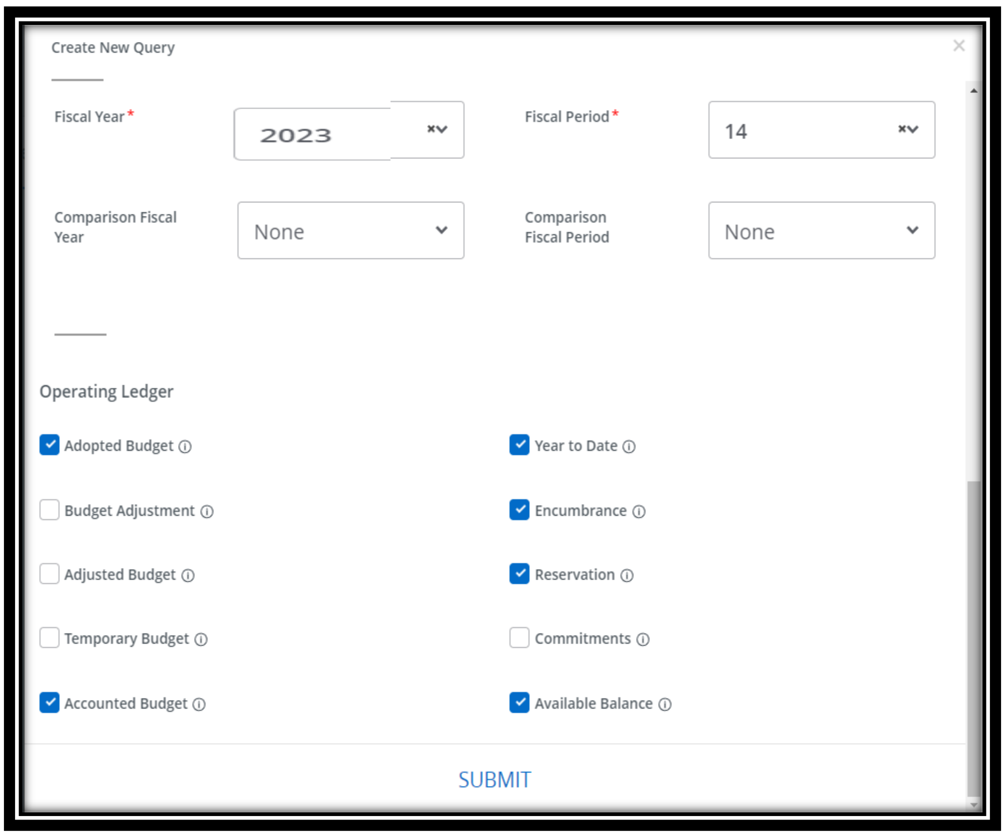
- Fund Number
- Organization
- Program Code



My Finance
Budget Status by Account Query-Revenues



Click the “Include Revenue” box.



Scroll down within the selection block. For the most current information, select…

Fiscal Year- 2023

Fiscal Period- 14

Recommended Operating Ledger Columns

- **Adopted Budget-** Budget at the beginning of the Fiscal Year (October 1)
- **Accounted Budget-** Budget as of ‘today’
- **Year-to-Date-** Transactions that have hit the Organization Code as of today
- **Encumbrances-** Purchase Orders (PO’s-Type of Commitment)
- **Reservations-** Requisitions (Type of Commitment)
- **Available Balance which is =**

  Accounted Budget minus Year-to-Date, Encumbrances, and Reservations

My Finance
Budget Status by Account Query-Revenues

Ms Tammy G Haymon

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account

New Query

Org Title and #

CHECK YOUR TITLE, FUND, ORG AND DATES!!

Query Results

Account	Account Title	FY23/PD14 Adopted Budget	FY23/PD14 Accounted Budget	FY23/PD14 Year to Date	FY23/PD14 Encumbrances	FY23/PD14 Reservation	FY23/PD14 Available Balance
5899	Miscellaneous Income	$0.00	$0.00	$10.00	$0.00	$0.00	($10.00)
5912	Housing Rent-Semester	$77,000.00	$77,000.00	$20,758.00	$0.00	$0.00	$56,242.00
7000	Expenditures	$77,000.00	$77,000.00	$0.00	$0.00	$0.00	$77,000.00
7304	Maint and Repair Equip	$0.00	$0.00	$0.00	$8.50		
7353					.00		
7357					.00		
					.00		
					.00		
Report Total (of all records)		$0.00	$0.00	$19,650.84	($1,008.50)	$0.00	($18,642.34)

5000-Revenues

Revenue Codes
Account codes with '5xxx' are Revenue. This line will only appear if 'Include Revenue Accounts' box is checked in the setup.

- The Accounted Budget is already available to be spent.
- The Year-to-Date has accrued within the Fiscal Year.
- The negative Available Balance amount is the result of the Accounted Budget minus theYTD revenue line in 5899/5912.

In this example, there is $10.00 available to increase the revenue and expenditure budgets.

Revenue Codes
If the 'Include Revenue Accounts' box is checked, you will notice the available balance is reversed. Revenue amounts are not available for use until they are added to the Expenditures budget.

Revenue Budget Change Requests

- Requests to increase revenue budgets should be emailed to:
- Tammy Haymon at tgh0008@uah.edu if you work in Student Affairs, Advancement, or Research.
- Melissa Brown at mab0063@uah.edu if you work in President/Athletic Office, Academic Affairs, or Diversity.
- The email request should include the following
  - Organization Code
  - Fund Code
  - Estimated amount

Please note, the Budget Office may request additional information from you related to the revenue source before processing your request.

Questions?

Contact us!
Melissa Brown: mab0063@uah.edu; Ext 5217
Tammy Haymon: tgh0008@uah.edu; Ext 2242