Budget Office Training

My Finance Self-Service

Budget Status by Account:
Finding Revenues
Click the ‘My Finance Query’ block on the main screen.
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

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

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

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

Click the “Include Revenue” box.
My Finance
Budget Status by Account Query-Revenues

- **Org Title and #**
- **CHECK YOUR TITLE, FUND, ORG AND DATES!!**

**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.

**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.

- 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 the YTD revenue line in 5899/5912.
  - In this example, there is $10.00 available to increase the revenue and expenditure budgets.
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