



Budget Review and Submission

Before submitting your budget:

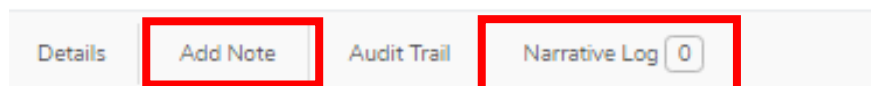
- Run the **“Comprehensive Budget/Amendment”** and the **“Budget Summary”** reports. These reports can be accessed by clicking the **“Reports”** option under the dashboard menu, and it will help you to review the information entered in your budget. Refer to the **SAMIS Fiscal Reports resource** for details on how to run the reports.
- Verify the total CSC budget (amount that is being requested) does not exceed the Total CSC Allocation.
- Verify a justification (when applicable) has been entered for all the line items used, and that the expense is allowable, reasonable and necessary for the program. Review the **Budget Guidelines** posted at <https://www.thechildrenstrust.org/content/policies-forms> for more details.
- Verify the **“Original CSC Allocation”** for the budget **plus** the total amount provided by other **“Funders (Program Funders)”** is equal to **“Original Program Budget.”**

Users reviewing a fiscal document can add a comment into the **“Add Note”** action bottom of the **Program Budget Screen**. The section is used to communicate any concerns or recommendations about the fiscal document. The feature is only available for users with assigned roles in the Approval Workflow Chain, and once the document is **“their queue.”** Any comments entered in the **“Add Note”** section will be permanently recorded in the **“Narrative Log”** section and document. The **“Narrative Log”** section will show the number of comments entered thus far.

Budget with no comments entered in the narrative log.

Budget #9999: PAR XX10-9999 My Sunny Agency of Miami-Dade

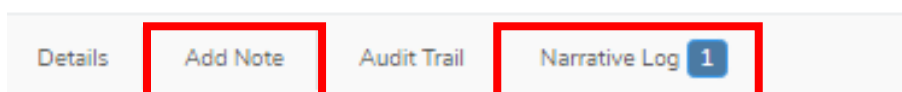
My Sunny Agency of Miami-Dade



Budget with comments entered in the narrative log


Budget #9999: PAR XX10-9999 My Sunny Agency of Miami-Dade

My Sunny Agency of Miami-Dade










To add a note:



1. Click the **“Add Note”** action button and type your comment in the Narrative screen.
2. Click the **“Edit Note”** link () to edit the entry. The Reviewer’s comments will be displayed in a list format.
 - Important:** Once the narratives are entered they cannot be edited if:
 - a. The budget document is no longer in his/her queue.
3. Once the comment is entered, it cannot be deleted. However, it can be modified.

When a document is forwarded, rejected or approved, a notification email is generated from the system to all users listed in the fiscal document’s approval chain set-up.

Once the budget is completed and/or reviewed, press **“Save”** or **“Forward”** to send the budget to the next person in the **Workflow Approval Chain**. The action buttons located at the bottom section of the Budget Summary screen will vary depending on the user’s assigned role.

Role	Actions buttons
Creator	  
Reviewer	 
Submitter	 
<ul style="list-style-type: none"> • Delete: Select the Delete button to <u>erase permanently</u> the document from the database. • Save: Select Save to keep the budget in Edit mode, with the ability to return to the page in a later time and continue editing the document • Forward: Select Forward to save the changes and send the document to the next person in the Workflow Approval Chain. • Reject: Select Reject to move the document to the creator for editing purposes. 	

Important: Only the user assigned to be the Submitter in the Workflow Approval Chain can submit a fiscal document to CSC. Once the document is submitted the document status will change from **“Edit”** to **“Submitted”**.