

Process to enter Requested Budget for upcoming Fiscal Year into CSI

Once logged into CSI

1. Go to Tools
 - a. Change System Dates
 - b. Change to future year
2. Systems
 - a. Budget Prep
 - i. Accounts
 1. Enter Edit Budget Prep Accounts
3. Begin Account
 - a. Your beginning account
 - i. For Example: Mayor & Council 100-10
 - b. Click Query at the bottom
 - i. Data Entry Tab opens up
 - c. Data Entry Tab will be displayed
 - i. Request Column
 1. Enter the amount of your request for that account number
 2. To update the comments/note
 - a. Right click in note column that appears beside budget year
 - i. Zoom edit to modify
 - ii. Click ok
 - d. Move to next account number for your department using the list tab and repeat the same process

An alternate process:

1. Got to Tools
 - a. Change System Dates
 - b. Change to future year
2. Systems
 - a. Budget Prep
 - i. Accounts
 1. Edit BP Original Budget
3. Begin Account
 - a. Your beginning account
 - i. For Example: Mayor & Council 100-10
 - ii. Click Query at the bottom
 1. Data Entry Tab opens up
 - b. Data Entry Tab
 - i. Request Column

1. Enter the amount of your request for each account number
- c. Then go to Enter Edit Budget Prep Accounts
 1. To update the comments/note
 - a. Right click in request column
 - i. Zoom edit to modify
 - ii. Click ok

Note:

The following items will be budgeted by the Finance Department, so please leave them blank:

1. Insurance Expense
2. Lease Payments
3. Dental Insurance
4. Group Medical
5. Opt-Out Insurance Plan
6. Payments to Retirement System
7. Social Security Payments
8. Workers Compensation
9. Positions Requested (A form is included to complete for Request for additional personnel. The only column you will need to complete is the Requested 2019 and provide suggested classification & pay rate.)

Can you also send an electronic copy of your updated Departmental Mission Statement and Goals for inclusion in the 2022 Budget Book?