What: Use this guide to complete the Budget Review & Approval process. Several reports are available allowing you to review your budgeting at various levels.

Who: Anyone involved in budgeting a department or unit.

Why: You can review reports to verify that your budget is complete and accurate.

When: Final submission of the Booked Budget is due in August. Your budget unit may have earlier deadlines to support internal review. Please coordinate with your Budget Officer.

Prerequisites:

<table>
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<tr>
<th>Step</th>
<th>Action</th>
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</table>
| 1    | You must have authority to complete the Budget Review & Approval process. Authority is granted through Authority Manager by org, project/task, or award. To complete this process, you must have one of the following roles assigned:  
  - Budget Officer / Formula School Budget Officer  
  - Budget Analyst  
  - Unit Manager  
  - Unit Financial Analyst / SoM Unit Analyst  
  - SoM DFA |
## Accessing the Budget Review & Approval Process

You must have authority to access the system. Authority is granted through Authority Manager by org, project/task, or award.

**Browser Requirements:**
- Google Chrome
- Internet Explorer 11+
- Safari Mobile on IOS-4+

### To access Tidemark:

<table>
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| 1    | Access the Tidemark application from the following website:  
  - [https://stanford.tidemark.net](https://stanford.tidemark.net) |
| 2    | Log into the application through WebAuth using your SUNet ID and password. |
| 3    | Click the **Financial Planning** icon. |
| 4    | Click the **Budget Review & Approval** icon to bring up the process. |

**Result:** Tidemark will list all financial planning processes available to you.

**Result:** The associated process map appears.
The Booked Budget process for Budget Review & Approval contains several panels which provide a consolidated view of all budgeting tasks performed in prior processes. These panels are also useful when crafting your final narrative for Booked Budget submission.

## Panel Descriptions

<table>
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<tr>
<th>Panel Name</th>
<th>Description</th>
<th>For detailed instructions, see page:</th>
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<td><strong>Budget Progression Report (101)</strong></td>
<td>Compare prior scenarios to verify the validity of the current Booked Budget.</td>
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<tr>
<td><strong>PTA by Award Type (802)</strong></td>
<td>Review the high-level object codes PTA by PTA to ensure that your ending fund balance is accurate.</td>
<td>5</td>
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<tr>
<td><strong>Review Consolidated Budget (200)</strong></td>
<td>Review the consolidated budget by award type. The UBO will review budgets in this format.</td>
<td>6</td>
</tr>
<tr>
<td><strong>Variance Report</strong></td>
<td>Review Booked Budget vs. Budget Plan and prior year Booked Budget.</td>
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</table>
Panel: Budget Progression Report (101)

Compare prior scenarios to verify the validity of the current Booked Budget:

<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 1    | On the Booked Budget Process map, click the **Budget Progression Report** panel.  
![Budget Progression Report Panel](image.png)  
**Result:** The corresponding panel opens. |
| 2    | Review the data displayed.  
   a. Review the page slice.  
The page slice controls which org is shown on the page. You can select any org that you have access to (either as a child or parent member of the org hierarchy).  
   b. Review the page edges.  
The page edges allow you to filter the data displayed on the page.  
   **Object Code Filter:**  
   - **Summary:** Consolidated Budget format  
   - **Detail:** Consolidated Budget format with additional levels of detail in key areas  
   - **All:** Consolidated Budget format with all object codes shown, in a hierarchy view with their roll-up.  
   c. Review the rows on the grid.  
The rows show the revenues, transfers, expenses, and beginning/ending fund balance based on the consolidated budget format. More detail can be shown using the Filter page edge (Summary, Detail, All).  
   d. Review the columns on the grid.  
The columns represent prior year actuals and earlier forecasted scenarios. Consolidated Operations is shown by default and can be filtered to a single CB award type. |
| 3    | If updates are necessary, return to the appropriate process to make changes. |
Panel: PTA by Award Type (802)

Review the high-level object codes PTA by PTA to ensure that your ending fund balance is accurate.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | From the prior step, click the advance paddle to move to **PTA by Award Type**.  
     | or  
     | On the Booked Budget Process map, click the **PTA by Award Type** panel. |
|      | **Result:** The corresponding panel opens. |
| 2    | Review the data displayed. |
|      | **a** Review the page slice.  
     | The page slice controls which org is shown on the page. You can select any org that you have access to (either as a child or parent member of the org hierarchy). |
|      | **b** Review the page edges.  
     | The page edges allow you to filter the data displayed on the page. |
|      | **c** Review the rows on the grid.  
     | Each PA/PTA that was budgeted will show as a separate row. |
|      | **d** Review the columns on the grid.  
     | The columns show the beginning balance plus revenues, less expenses, plus or minus the various types of transfers, and the ending fund balance. |
| 3    | If updates are necessary, return to the appropriate process to make changes. |
Panel: Review Consolidated Budget (200)

Review the consolidated budget by award type. The UBO will review budgets in this format.

<table>
<thead>
<tr>
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</table>
| 1    | From the prior step, click the advance paddle to move to **Review Consolidated Budget (200)** panel.  
   or  
   On the Booked Budget Process map, click the **Review Consolidated Budget (200)** panel.  
   ![Diagram of process map](image)
   **Result:** The corresponding panel opens. |
| 2    | Review the data displayed.  
   **a** Review the page slice.  
   The page slice controls which org is shown on the page. You can select any org that you have access to (either as a child or parent member of the org hierarchy).  
   **b** Review the page edges.  
   The page edges allow you to filter the data displayed on the page.  
   **Object Code Filter:**  
   - Summary: Consolidated Budget format  
   - Detail: Consolidated Budget format with additional levels of detail in key areas  
   - All: Consolidated Budget format with all object codes shown, in a hierarchy view with their roll-up.  
   **c** Review the rows on the grid.  
   The rows show the revenues, transfers, expenses, and beginning/ending fund balance based on the consolidated budget format. More detail can be shown using the Filter page edge (Summary, Detail, All).  
   **d** Review the columns on the grid.  
   The Booked Budget for the current year divided by the CB award type. |
| 3    | If updates are necessary, return to the appropriate process to make changes. |
Panel: Variance Report

Review Booked Budget vs. Budget Plan and prior year Booked Budget.

<table>
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</table>
| 1    | From the prior step, click the advance paddle to move to **Variance Report** panel.  
**or**  
On the Booked Budget Process map, click the **Variance Report** panel.  
![Image](image_url)  
**Result:** The corresponding panel opens. |
| 2    | Review the data displayed.  
- **a** Review the page slice.  
The page slice controls which org is shown on the page. You can select any org that you have access to (either as a child or parent member of the org hierarchy).  
- **b** Review the page edges.  
The page edges allow you to filter the data displayed on the page.  
Object Code Filter:  
  - Summary: Consolidated Budget format  
  - Detail: Consolidated Budget format with additional levels of detail in key areas  
  - All: Consolidated Budget format with all object codes shown, in a hierarchy view with their roll-up.  
- **c** Review the rows on the grid.  
The rows show the revenues, transfers, expenses, and beginning/ending fund balance based on the consolidated budget format. More detail can be shown using the Filter page edge (Summary, Detail, All).  
- **d** Review the columns on the grid.  
The columns represent prior year actuals and earlier forecasted scenarios. Consolidated Operations is shown by default and can be filtered to a single CB award type. Variances are shown by percent and $ amounts. |
| 3    | If updates are necessary, return to the appropriate process to make changes. |