

From: [Linda Amidon](#)
To: [Administrative Council Members](#); [Division Chairs](#); [Gloria Carmona](#); [Norma Nava](#); [Frances Beope](#); [Olga Artech](#); [Dolores Diaz](#); [Myriam Fletes](#); [Carol Lee](#); [Rosalie Lopez](#); [Jim Mecate](#); [Robin Ying](#); [Rick Webster](#); [Alyn Leon](#); [David Drury](#); [David Zielinski](#); [Dawn Chun](#); [Efrain Silva](#); [Gonzalo Huerta](#); [Janis Magno](#); [Jesus Esqueda](#); [John Lau](#); [Jose Lopez](#); [Kathy Berry](#); [Lianna Zhao](#); [Mary Lofgren](#); [Melani Guinn](#); [Michael Heumann](#); [Suzanne Gretz](#); [Taylor Ruhl](#); [Ted Ceasar](#); [Tina Aguirre](#); [Toni Pfister](#); [Valerie Rodgers](#); [Victor Jaime](#)
Cc: [Division Secretaries](#); [Lourdes Ayon](#); [Martha P. Garcia](#); [Mary Carter](#); [Vikki Carr](#)
Subject: FW: Time Sensitive - Program Review Training
Date: Monday, September 21, 2009 3:53:00 PM
Importance: High

THE FOLLOWING MESSAGE IS SENT ON BEHALF TINA AGUIRRE, INTERIM VICE PRESIDENT FOR ACADEMIC SERVICES:

The Program Review form has been changed as a result of an evaluation conducted by subcommittees of the Educational Master Plan Committee (EMPC). The new formats will correct common issues experienced by department heads and by the EMPC subcommittees to enter, review, summarize, and prioritize the department needs. We believe the changes to both Part 1 (Annual Program Review) and Part 2 (Comprehensive Program Review) will simplify, clarify, and standardize the process.

The old Part 1 for budget, staff, equip, etc has been converted to a web-based database/template and ties the budget request for each individual line item to a specific EMPC Plan (i.e., Technology, Staffing, Facilities, etc.). The new Part 1 will also make quick work of building each of the 7 "Plans".

The new Part 2 for comprehensive review remains in a Word format, but it has been updated to clearly identify the periods for which program performance and objectives are under review: 1. Past (the past three academic years, 2. Present, and 3. Future (next three academic years). There will also be a standardized format for the initial basic data.

Training on the updated forms is scheduled for **Thursday September 24 at 3:00 p.m. and Friday September 25 at 11:45 a.m.** Both training sessions will take place in **Room 2131**. It is critical for you and your support staff to attend one of the training sessions. The updated forms along with written instructions will be provided prior to the training. Although the program review forms can easily be completed following the instructions, we highly encourage you and your staff to attend one of the training sessions.

As a reminder of the timeline, **step 1 and 2** (below) must be completed before we leave on 12/12/09 for vacation.

1. Each ORG must complete an annual program review and each assigned comprehensive review must be completed and
2. 6 Plans (technology, facilities, staffing, professional development, marketing, and SLO) will be created based on the information in step one and must be submitted

to their appropriate committee for review, then submitted to the Educational Master Plan Committee

Special thanks to those that were instrumental in developing the new forms: Omar Ramos, Val Rodgers, Melani Guinn, Suzanne Gretz, Frances Beope, and Dawn Chun.

*Justina Aguirre, RN, MSN
Assoc. Dean Nursing and Allied Health
Imperial Valley College
380 East Aten Road
P.O. Box 158
Imperial, CA 92251-0158
(760) 355-6348*

From: [Tina Aguirre](#)
To: [Omar E. Ramos](#); [Linda Amidon](#)
Subject: FW: assign all ORGs
Date: Monday, September 21, 2009 3:55:34 PM

Hi Omar,

The 'minor' changes are listed below and were recommendations made by the Educational Master Plan Committee

- Change "Routine Instructional Cost" to "Routine **Operational** Cost" in the Plan List .
- Although there is no one specific line item for marketing expenses (the line items used by programs vary and range from 4460-office supplies, 4455-copying/printing, and 5890-other, among others), programs should be allowed to make requests for marketing activities. Would the **ORG** column allow for text codes such as "MARK" or "MKTG" [as we may not know what is actually needed to market?](#) Would it create a problem if the budget request field **09-10** for this item were left blank or "Unknown" inserted in this field – [again because we may not know what is needed in dollars?](#)
- Insert a **GEN0** for the plan committees, i.e., Technology Council, Staffing Committee, etc to place their recommendations ([GEN0 column](#)) and prioritizations (justification column). Then the when returned to the owner and forwarded to Planning and Budget, **GEN1** can be created .
- Add a text field for course level SLO's at the end of the form (more than 255 characters). This one should not be tied to budget, but will allow a response to Toni's directions
- Add one more text field for "Other." Just in case.

By the way, we are planning to provide training on the Part 1 **Thursday September 24 at 3:00 p.m. and Friday September 25 at 11:45 a.m.** in **Room 2131**. Would you be available to provide any of the Part 1 training?

Thanks! Let [us](#) know if you have questions [as this may be confusing](#)

Linda & Tina

From: Tina Aguirre

Sent: Friday, September 18, 2009 1:52 PM
To: Omar E. Ramos
Cc: Linda Amidon
Subject: RE: assign all ORGs

Since I am covering Kathy it should be 'super user' status all 'instructional ORGS'. If you feel that is too much for me – just give it to Linda Amidon

Linda's specific area is 201 – 205, but she has to monitor and work with all of them.

By the way, Linda has some minor changes....

Tina

From: Omar E. Ramos
Sent: Friday, September 18, 2009 1:49 PM
To: Tina Aguirre
Cc: Linda Amidon
Subject: RE: assign all ORGs

By all Orgs you mean 371-386 correct?

I'll email you both back in just a few moments after I've made the assignments...

Omar Ramos
Webmaster
Imperial Valley College
760-355-6500

From: Tina Aguirre
Sent: Friday, September 18, 2009 1:48 PM
To: Omar E. Ramos
Subject: assign all ORGs

Omar

While Kathy is out can you assign me and Linda Amidon to all ORGS

Once she returns I will be glad to go back to just mine....

371 through 386

Thanks

*Justina Aguirre, RN, MSN
Assoc. Dean Nursing and Allied Health
Imperial Valley College
380 East Aten Road
P.O. Box 158*

Imperial, CA 92251-0158
(760) 355-6348

From: [Tina Aguirre](#)
To: [Adriana Sano](#); [Becky Green](#); [Bill Gay](#); [Carol Lee](#); [Charlene Cruz](#); [David Drury](#); [David Zielinski](#); [Dawn Chun](#); [Efrain Silva](#); [Eric Lehtonen](#); [Gloria Carmona](#); [John Lau](#); [Raquel Gonzalez](#); [Rick Webster](#); [Ted Ceasar](#); [Toni Pfister](#)
Cc: [Linda Amidon](#)
Subject: FW: Program Review Org Assignments Sheet Update
Date: Monday, October 05, 2009 10:35:18 PM
Attachments: [2010-2011_ORG_Assignments.xlsx](#)

Ladies and Gentlemen

Many of you will not have to enter the data into the on-line budget /program review form, however, you will be looking at it. Therefore, we need you to take 5 minutes (actual) to log in. Omar must make sure the on-line form is working.

Go to: <http://staff.imperial.edu>. Log on is on the upper right hand side. Please call Omar if you need any help and he has scheduled some training if you think you need it.

Tina

From: Omar E. Ramos
Sent: Monday, October 05, 2009 1:45 PM
To: Tina Aguirre
Subject: Program Review Org Assignments Sheet Update

Updated just a few moments ago...mostly everyone has checked in so that I could make the ORG assignments for them.

The remaining people on the list that haven't logged in yet would be:

1. Adriana Sano
2. Becky Green
3. Bill Gay
4. Carol Lee
5. Charlene Cruz
6. Dave Drury
7. Dave Zielinski
8. Dawn Chun
9. Efrain Silva
10. Eric Lehtonen
11. Gloria Carmona
12. John Lau
13. Raquel Gonzalez
14. Rick Webster
15. Ted Ceasar
16. Toni Pfister

Omar Ramos
Webmaster
Imperial Valley College

760-355-6500

ORG for Program Review/Budget	Authorized	Authorized 2	Authorized 3	Authorized 4	Authorized 5	Authorized 6
101 Superintendent / President	Vikki Carr	Adriana Sano	Patricia Robles			
102 Research	Dawn Chun					
103 HR	Travis Gregory	Martha P. Garcia				
104 Public Relations/Marketing	Bill Gay	Rosanna Lugo				
107 CSEA	Vikki Carr	Adriana Sano				
108 Title 5	Dawn Chun	Valerie Rogers				
109 HR - General Safety	Travis Gregory					
110 HR - Safety Credits	Travis Gregory	Martha P. Garcia				
111 Superintendent / President Search - not in use						
112 Stakeholders & Visioning Process	Bill Gay	Rosanna Lugo				
113 Welcome Back Event	Vikki Carr	Adriana Sano				
114 CTA	Vikki Carr					
151 Board of Trustees Office	Vikki Carr	Adriana Sano				
152 Board Reserves	Vikki Carr	Adriana Sano	Carlos Fletes			
201 Academic Services	Kathy Berry	Linda Amidon	Patricia Robles			
202 Academic Senate	Norma Nunez	Lourdes Ayon	Karina Lopez			
204 Evening College	Kathy Berry	Linda Amidon				
205 SLO Department	Kathy Berry	Toni Pfister				
211 English	Dave Zielinski		Patricia Robles			
221 Behavioral Social Science	Suzanne Gretz	Rhonda Ruiz				
222 AJ	Suzanne Gretz	Rhonda Ruiz	Patricia Robles			
223 Adm Just - CE/Reserve	Suzanne Gretz	Rhonda Ruiz				
224 Correctional Science	Suzanne Gretz	Rhonda Ruiz	Patricia Robles			
225 POST	Suzanne Gretz	Rhonda Ruiz	Patricia Robles			
241 Exercise	Dave Drury	Sandie Noel				
242 Wellness Center	Dave Drury	Sandie Noel				
261 Humanities	Melani Guinn	Jessica Waddell				
262 Foreign Languages - not in use						
271 Science Math Engin	Lianna Zhao	Carol Cortes-Ramirez	Ofelia Duarte	Pat Pauley	Eric Lehtonen	Patricia Robles
281 General Athletics	Dave Drury	Sandie Noel				
282 Basketball - Women	Dave Drury	Sandie Noel				
283 Basketball - Men	Dave Drury	Sandie Noel				
284 Baseball - Men	Dave Drury	Sandie Noel				

285 Softball - Women	Dave Drury	Sandie Noel		
286 Tennis - Women	Dave Drury	Sandie Noel		
287 Tennis - Men	Dave Drury	Sandie Noel		
288 Soccer - Women	Dave Drury	Sandie Noel		
289 Soccer - Men	Dave Drury	Sandie Noel		
291 Volleyball	Dave Drury	Sandie Noel		
292 General Athletics - Cheer	Dave Drury	Sandie Noel		
293 General Athletics - Playoffs	Efrain Silva	Sandie Noel		
294 Men Track	Dave Drury	Sandie Noel		
295 Women Cross Country	Efrain Silva	Sandie Noel		
301 Applied Sciences	Efrain Silva	Lency Lucas	Patricia Robles	
306 Apprentice Program	Efrain Silva	Patricia Robles		
309 Renewable Energy		Patricia Robles		
312 Child Family, Consumer	Becky Green	Lency Lucas		
313 Child Family, Consumer	Becky Green	Lency Lucas	Patricia Robles	
314 Child Family, Consumer	Becky Green	Lency Lucas		
315 Independent Living Program	Becky Green	Lency Lucas		
317 Preschool	Becky Green	Lency Lucas		
331 Industrial Tech Office	Efrain Silva	Jose Lopez	Frances Arce-Gomez	
333 Auto Body and Painting	Efrain Silva	Jose Lopez	Frances Arce-Gomez	Patricia Robles
334 Automotive Tech	Efrain Silva	Jose Lopez	Frances Arce-Gomez	Patricia Robles
335 Automotive Tech Learning Center	Efrain Silva	Jose Lopez	Frances Arce-Gomez	
336 Electronics	Efrain Silva	Jose Lopez	Frances Arce-Gomez	Patricia Robles
338 Water Treatment Technology	Efrain Silva	Jose Lopez	Frances Arce-Gomez	
339 Welding	Efrain Silva	Jose Lopez	Frances Arce-Gomez	Patricia Robles
340 HVAC	Efrain Silva	Jose Lopez	Frances Arce-Gomez	Patricia Robles
341 Tool Room	Efrain Silva	Jose Lopez	Frances Arce-Gomez	
342 Building Construction Technologies	Efrain Silva	Jose Lopez	Frances Arce-Gomez	Patricia Robles
343 Electrical Residential Technologies	Efrain Silva	Jose Lopez	Frances Arce-Gomez	
352 Business	Valerie Rogers	Maria Sell		
353 Computer Information Systems	Valerie Rogers	Maria Sell		Patricia Robles
354 Computer Programming	Valerie Rogers	Maria Sell		
371 Nursing	Tina Aguirre	Laura Hartsock	Dolores Hartfield	
372 Continuing Education	Tina Aguirre	Laura Hartsock	Sara Wheat	

374 EMT	Tina Aguirre	Laura Hartsock	Sara Wheat	
376 Fire Science	Tina Aguirre	Laura Hartsock	Sara Wheat	Patricia Robles
377 Health Technologies	Tina Aguirre	Laura Hartsock	Sara Wheat	
378 Medical Assistant	Tina Aguirre	Laura Hartsock	Sara Wheat	
381 Nursing Learning Center	Tina Aguirre	Laura Hartsock	Dolores Hartfield	
384 Nursg grant	Tina Aguirre	Laura Hartsock	Dolores Hartfield	
386 Nursing grant	Tina Aguirre	Laura Hartsock	Dolores Hartfield	
391 Workforce Development Center	Efrain Silva	Dixie Krimm		Patricia Robles
401 Brawley Center	Efrain Silva	Dixie Krimm		
421 Calexico Center	Efrain Silva	Dixie Krimm		
441 El Centro Center	Efrain Silva	Dixie Krimm		
442 Driver Improvement Training	Efrain Silva	Dixie Krimm		
443 Extended Campus	Efrain Silva	Dixie Krimm		
444 Non-credit Program	Efrain Silva	Dixie Krimm		
451 Small Business Development Center	Efrain Silva	Dixie Krimm		
501 Library Audio/Visual	Taylor Ruhl	Toni Gamboa		
502 Learning Center	Taylor Ruhl	Toni Gamboa	Patricia Robles	
503 Reading/Writing Lab	Taylor Ruhl	Toni Gamboa	Patricia Robles	
504 Language Lab	Taylor Ruhl	Toni Gamboa		
505 Reprographics	Bill Gay	Mike Nicholas?	Rosanna Lugo	
506 Tech Center	Robin Ying	Larry Valenzuela		
508 IT - Application Services	Robin Ying	Jeff Cantwell	Gordon Bailey?	
509 IT - Technical Services	Robin Ying	Jeff Cantwell	Gordon Bailey?	
801 Vice Pres Business Services Office	John Lau	Mary Carter	Carlos Fletes	
802 Food Services	Carlos Fletes	Mary Carter		
808 Campus Security	Gina Madrid	Mary Carter	Carlos Fletes	
821 Purchasing	Raquel Gonzalez	Mary Carter	Carlos Fletes	
822 Receiving/Warehouse	Raquel Gonzalez	Mary Carter	Carlos Fletes	
823 Vehicle Rentals	Raquel Gonzalez	Mary Carter	Carlos Fletes	
824 Vans	Raquel Gonzalez	Mary Carter	Carlos Fletes	
831 Fiscal Services - Director	Carlos Fletes	Mary Carter	Carlos Fletes	
832 AP/AR, Payroll/Benefits	Carlos Fletes	Mary Carter	Carlos Fletes	
833 Parking Control	Gina Madrid	Mary Carter	Carlos Fletes	
834 Financial Aid Accounting	Carlos Fletes	Mary Carter	Carlos Fletes	

838 Parking-Citations	Gina Madrid	Mary Carter		
841 PTMISEA Construction	Carlos Fletes			
851 Custodial Department	Rick Webster	Mary Carter		
852 Grounds Department	Rick Webster	Mary Carter		
853 Maintenance Department	Rick Webster	Mary Carter		
854 Transportation Department	Rick Webster	Mary Carter		
855 Water Treatment Plant	Rick Webster	Mary Carter		
856 Operations, Utilities	Rick Webster	Mary Carter	Carlos Fletes	
857 Scheduled Maintenance	Rick Webster	Mary Carter	Carlos Fletes	
858 Community Service				
870 Building Construction Cost	Carlos Fletes			
871 Architect Fees	Carlos Fletes			
872 Construction Mgmt	Carlos Fletes			
873 Inspect Testing Permits	Carlos Fletes			
874 GOB - Contingency	Carlos Fletes			
875 GOB - Furnishing & Equipment	Carlos Fletes			
876 GOB - Parking Lot & Softball Field	Carlos Fletes			
877 GOB - Maintenance and Repair	Carlos Fletes			
878 GOB - Parking Lot Construction	Carlos Fletes			
880 Brawley RDA #1	Carlos Fletes			
885 Imperial RDA	Carlos Fletes			
890 El Centro RDA	Carlos Fletes			
893 Westmorland RDA	Carlos Fletes			
895 Calexico RDA	Carlos Fletes			
897 Misc Building Funds	Carlos Fletes			
898 Calipatria RDA	Carlos Fletes			
899 Art Gallery Insurance Payment	Carlos Fletes			
901 Vice Pres Student Services Office	Sergio Lopez	Saria Cardoza	Claudia Aguilar	Patricia Robles
902 Admissions & Registration Staff	Gloria Carmona			
903 DSPS Staff	Ted Ceasar			
904 District Counseling Staff	Lourdes Ayon	Victor Jaime		
905 Matriculation Counseling Staff	Lourdes Ayon	Frances Beope	Norma Nunez	
906 Student Support Services Program	Lourdes Ayon	Victor Jaime	Dolores Diaz	
907 Student Affairs Staff	Sergio Lopez	Saria Cardoza	Claudia Aguilar	

908 Upward Bound Program Staff	Lourdes Ayon	Victor Jaime	Erika Aguilar
909 Talent Search Program Staff	Lourdes Ayon	Victor Jaime	Erika Aguilar
910 Transfer Center	Carol Lee	JoAnn Green	
911 Student Organizations			
912 Student Representation Fee			
913 Commencement	Sergio Lopez	Saria Cardoza	Claudia Aguilar
914 Career Fair	Carol Lee	JoAnn Green	
915 Student Health Center	Sergio Lopez	Saria Cardoza	Claudia Aguilar
916 Parking Control Office	Gina Madrid	John Lau	
919 ASG Student Employment/CWS	Sergio Lopez	Saria Cardoza	Claudia Aguilar
920 Swimming Pool	Sergio Lopez	Saria Cardoza	Claudia Aguilar
921 Matriculation Counseling - PD100	Lourdes Ayon	Frances Beope	
931 Financial Aid	Janis Magno		
932 CalWorks Assessment/Counseling			
933 EOPS	Janis Magno		
934 CARE	Janis Magno		
935 Agency Workstudy			
936 .			
937 Cal Works	Janis Magno	Lilia Sandoval	Mabel Vargas
938 IVROP			

From: [Tina Aguirre](#)
To: [Administrative Council Members](#); [Division Secretaries](#); [Division Chairs](#); [Deans Of Instruction](#); [Deans of Instruction Secretaries](#); [Linda Amidon](#); [Kevin White](#); [Michael Heumann](#); [Toni Pfister](#)
Subject: FW: Updated Program Review App Documentation
Date: Tuesday, September 22, 2009 8:56:31 PM
Attachments: [Program Review Application Documentation.pdf](#)
[Adding Budget Requests Documentation.pdf](#)

This email is meant for anyone who is responsible for a program review and their support staff.

Attached are two files for the training scheduled for **Thursday September 24 at 3:00 p.m. and Friday September 25 at 11:45 a.m.** Both training sessions will take place in **Room 2131**. The attached files refer to the new Staff Website: : <http://staff.imperial.edu>

We are asking for you and your support staff to learn how to enter data into the new form as we will all need help to meet the following deadlines.

10/26/09 Complete ALL program reviews for 2010-2011 (annual and comprehensive). This requires projecting the schedules for the entire year (2010-2011) and using the Enlighten enrollment tool.

11/17/09 ALL 2010-2011 program reviews must be submitted and reviewed by ALL 'Plan Committees' ; i.e. technology, staffing, facilities, etc. This is where the shared governance begins in this process and recommendations go to GEN O

12/12/09 ALL 2010-2011 program reviews must be submitted and reviewed by College Council and/or Academic Senate. This is the second step for shared governance. Additional recommendations will be considered for GEN O

Jan 2010 Division Chairs will finalize GEN 1 based on the all the prior steps and forward to ...

Feb 2010 Planning and Budget Committee and Finance Dept will review GEN 1 and determine if further changes needed based on fiscal status

Mar/Apr 10 GEN 1 or 2 will be prepared for submittal to the Board

May/June 10 Budget approved and Divisions aware.

Jul 1, 2010 New budget begins

Sep 2010 Budget revisions to the Board based on state budget changes.

Adding Budget Requests

1. Select the Codes for your Line Item:

In the screenshot below you'll see the interface for **Step 1** of the application. You'll automatically have your first Org Code selected in the **Your Org Codes** section, along with the **Previously Used Fund, Program, and Account Codes** for that Org Code (that is, the codes that have been used previously when creating budget requests in previous years).

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261 352 371 508 509	11001 - Unrestricted - General 11002 - Summer School 11003 - Summer 2 11301 - DSPS Matching Funds 11501 - Lottery Unrestricted 115018 - Lottery Unrestricted c/o 11502 - Lottery Instructional Materials	1000 - Fine and Applied Arts 1100 - Foreign Language 6190 - Other Instructional Support	1110 - Instruction Regular Salaries 1270 - Chair/Coordinator Salaries 1320 - FT Summer Teaching 1325 - FT Winter Teaching 1330 - Adjunct Faculty Salaries 1340 - Overload Full-Time Faculty Salaries 2120 - Secretarial/Clerical Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

You may also notice the big red bar that says **“Click Here to see last year’s budget requests for the selected ORG Code”** if you click on this bar it will display a **sortable** table with all of last year’s Budget Requests, ordered by Budget Phase, Fund, Program, Account.

My thought here is that having this table available will help in the addition process since you would quickly be able to see what was put into the budget last year (particularly, you would be able to see **which FOAPAL combinations you used last year**).

Due its size, you’ll see a screenshot of this table on the next page.

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261 352 371 508 509	11001 - Unrestricted - General 11002 - Summer School 11003 - Summer 2 11301 - DSPS Matching Funds 11501 - Lottery Unrestricted 115018 - Lottery Unrestricted c/o 11502 - Lottery Instructional Materials	1000 - Fine and Applied Arts 1100 - Foreign Language 6190 - Other Instructional Support	1110 - Instruction Regular Salaries 1270 - Chair/Coordinator Salaries 1320 - FT Summer Teaching 1325 - FT Winter Teaching 1330 - Adjunct Faculty Salaries 1340 - Overload Full-Time Faculty Salaries 2120 - Secretarial/Clerical Salaries

Click Here to see last year's budget requests for the selected ORG Code...

Total Line Item Sum for GEN1: \$63,094
Total Line Item Sum for GEN2: \$2,213,660
Total Line Item Sum for GEN4: \$2,709,040
Total Line Item Sum for GEN5: \$2,303,518
Total Line Item Sum for GEN6: \$2,303,518
Total Sum for all Budget Phases: \$9,592,830

#	Phase	ORG	FUND	PROGRAM	ACCOUNT	Account Description	Amount	Date	Banner User
338	GEN1	261	11001	1000	4320	Instructional Supplies and Material	\$8,000	2009-03-30	JESSICA_WADDELL
337	GEN1	261	11001	1000	4325	Music Supplies	\$5,000	2009-03-30	JESSICA_WADDELL
336	GEN1	261	11001	1000	4340	Media Materials	\$3,500	2009-03-30	JESSICA_WADDELL
335	GEN1	261	11001	1000	4401	Non-Instructional Supply / Material	\$4,100	2009-03-30	JESSICA_WADDELL
334	GEN1	261	11001	1000	4455	Copying/Printing	\$12,000	2009-03-30	JESSICA_WADDELL
333	GEN1	261	11001	1000	4460	Office Supplies	\$5,000	2009-03-30	JESSICA_WADDELL
332	GEN1	261	11001	1000	4461	Copier Supplies	\$1,500	2009-03-30	JESSICA_WADDELL
331	GEN1	261	11001	1000	5110	Consulting Services	\$5,000	2009-03-30	JESSICA_WADDELL
330	GEN1	261	11001	1000	5190	Models	\$1,000	2009-03-30	JESSICA_WADDELL
329	GEN1	261	11001	1000	5220	Travel - Staff Conferences	\$4,800	2009-03-30	JESSICA_WADDELL
328	GEN1	261	11001	1000	5540	Telephone and Data Lines	\$150	2009-03-30	JESSICA_WADDELL
327	GEN1	261	11001	1000	5621	Copier Maintenance Agreements	\$2,400	2009-03-30	JESSICA_WADDELL
326	GEN1	261	11001	1000	5640	Equipment Repairs	\$2,000	2009-03-30	JESSICA_WADDELL
325	GEN1	261	11001	1000	5860	Postage	\$1,000	2009-03-30	JESSICA_WADDELL
324	GEN1	261	11001	1000	6490	Equipment - New Eqp under 5000	\$7,644	2009-03-30	JESSICA_WADDELL
323	GEN2	261	11001	1000	1110	Instruction Regular Salaries	\$610,700	2009-07-01	CARLOS_FLETES
322	GEN2	261	11001	1000	1270	Chair/Coordinator Salaries	\$69,727	2009-07-01	CARLOS_FLETES
321	GEN2	261	11001	1000	1330	Adjunct Faculty Salaries	\$234,360	2009-07-01	CARLOS_FLETES

2. Enter in the amount, a short justification, the priority and select a plan for your Line Item:

As you select Previously Used Fund, Program, and Account Codes from the list boxes in Step 1 you'll notice that the text boxes in Step 2 will automatically fill in for each of those as shown below:

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
261	11001	1000	1110		0		Select Plan	ADD LINE ITEM

Click Here to Enter in a Longer Justification...

Unless you need to use a Fund, Program, or Account Code that you've never used before you won't need to do anything besides select from the lists of previously used codes, but should the need arise to use a **new code**, just enter it into the text box and everything should be fine (**in other words, you are not limited to using only those codes which you have used before**).

The main part of Step 2 is entering in **an amount, a short justification (255 characters or less) and selecting a priority and Plan** from the dropdown list and then **clicking** on the **Add Line Item** button.

AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
	9	Required in order for th	Staffing	ADD LINE ITEM

Current Plan List:

PLAN
Select Plan
Select Plan
Facilities
Marketing
Professional Development
Routine Operational Cost
SLO
Staffing
Technology

The other part (which you probably don't want to worry about normally to make line item addition quicker) is the **long justification toggle**:

The screenshot shows a rich text editor window with a red header bar that says "Click Here to Enter in a Longer Justification...". Below the header is a toolbar with various icons for text formatting, alignment, and insertion. The main area is a large, empty text box. At the bottom, there are tabs for "Design", "Source", and "Preview", and a footer that says "Use Shift+Enter for a
 tag".

3. Modifying Line Items

I didn't want to pollute the database on the staff website with test entries so the screenshots below are from my testing server:

At the beginning the Your Line Items area will look like the following since it will not have anything just yet:

Your Line Items

But as you add entries you'll begin to see a table being created:

Your Line Items							Your Line Item Sum is: \$2,351,394		
ID	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT	
63	261	11701	6190	3220	ya ya...	\$0.00	\$0.00	\$100	
62	261	11701	1000	3110	Testing the new justifica...	\$9,797.80	\$7,485.00	\$10,000	
61	261	11301	1000	3110	Testing new account code ...	\$6,909.54	\$8,576.00	\$10,000	
60	261	11002	1100	3110	Testing new account code ...	\$1,721.86	\$2,433.00	\$10,000	
59	261	11001	1000	1270	Testing the new previous ...	\$67,731.88	\$67,382.00	\$15,000	
58	261	11301	1000	1110	Updated Line Items Table ...	\$63,539.75	\$0.00	\$100,000	
57	261	11001	1100	1110	asdf...	\$324,758.20	\$0.00	\$12,150	
56	261	11001	1000	1110	Testing the previous year...	\$596,237.62	\$0.00	\$540,000	
55	261	11003	6190	3430	Updated Line Items Table ...	\$0.00	\$0.00	\$54,000	
54	261	16301	1000	3430	...	\$0.00	\$0.00	\$130,000	
53	261	11001	6190	4321	...	\$0.00	\$0.00	\$19,000	
52	261	15105	1000	3510	...	\$0.00	\$0.00	\$150,000	
51	261	11502	1100	3430	...	\$0.00	\$0.00	\$1,250	
50	261	16301	6190	6490	...	\$0.00	\$0.00	\$10,994	
49	261	16301	1000	6490	...	\$0.00	\$0.00	\$11,500	
48	261	16301	1000	5110	...	\$0.00	\$0.00	\$1,500	
47	261	115028	1100	5220	...	\$0.00	\$0.00	\$115,400	
46	352	11701	0500	4340	...	\$0.00	\$0.00	\$1,500	
45	261	11003	1100	1270	...	\$0.00	\$0.00	\$10,000	
44	261	115028	1000	3411	...	\$0.00	\$0.00	\$585,000	
43	261	15105	1100	5190	...	\$0.00	\$0.00	\$15,000	
42	261	11003	1000	1320	...	\$0.00	\$0.00	\$15,000	
41	261	11301	1100	1270	...	\$0.00	\$0.00	\$15,000	
40	261	11002	1000	5110	...	\$0.00	\$0.00	\$515,500	
39	261	11501	1100	3410	...	\$0.00	\$0.00	\$1,500	
38	261	16301	6190	6129	...	\$0.00	\$0.00	\$1,000	
1	352	15105	0500	3420	...	\$0.00	\$0.00	\$1,000	
						Used Total: \$1,070,696.65	Budgeted Total: \$85,876.00	Total: \$2,351,394.00	

On the right-side of the table you'll see the following columns: Used, Budgeted, and Amount. The **Used** and **Budgeted** figures come from the last **completed** fiscal year's operating ledger, while the **Amount** column contains the figures you just entered into the program. Hopefully the extra Used and Budgeted columns will help for comparing the new figures with previous years.

Additionally, you may notice the links within the **ID** and **Justification** columns. When clicked on, each of these will popup a screen that will allow you to modify the Amounts+Plan or Short and Long Justifications, respectively. Not shown above as it was recently added is the **Priority** column, which is displayed next to the **ID** field on the left side of the table.

Here is an example of the Amount+Plan edit screen:

11701 0500 3110 Test Priority (but no pri... \$3,103.24 \$3,268.00

Edit Line Item:

AMOUNT	PRIORITY	PLAN
10000	0	Marketing

Update Line Item

Detailed FOAPAL Description:

Type	Code	Description
Fund	11701	Winter Intersession
Org	261	Humanities
Account	3110	STRS Certificated Instructional
Program	1000	Fine and Applied Arts

Adjustment History:

#	PRI	Description	Amount	Created	Modified By
2	0	EDITED PLAN TO Marketing	\$10,000	2009-09-17 17:34:49	omar.ramos
1	0	ADDED LINE ITEM	\$10,000	2009-09-16 22:24:18	omar.ramos

Previously Used Amounts for this FOAPAL:

#	FISCAL YEAR	USED	BUDGETED
5	FY10	\$0.00	\$4,009.00
4	FY09	\$9,797.80	\$7,485.00
3	FY08	\$7,186.66	\$7,630.45

Here is an example of the Justifications Edit screen:

301 1000 3110 Testing new account code... \$6,909.54 \$8,576.00

Edit Short and Long Justifications:

Update Line Item

SHORT JUSTIFICATION	UPDATE DESCRIPTION
Testing the new justification description field	

LONG JUSTIFICATION

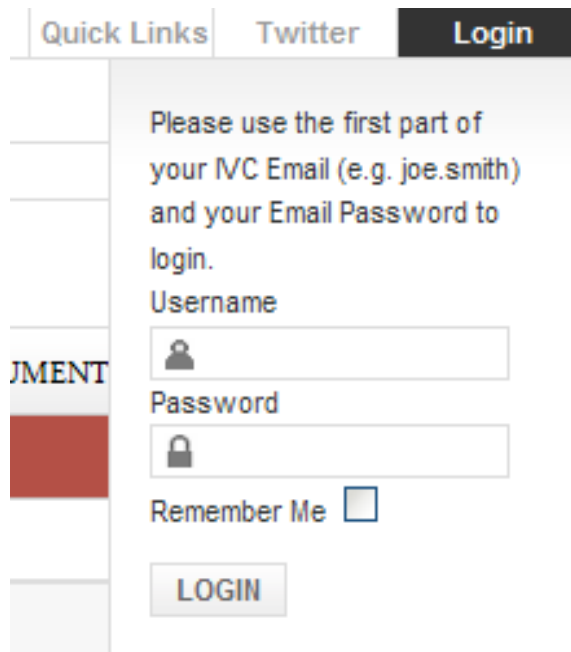
B I U ABC | Styles Paragraph

Testing the new justification description field

Program Review Application

1. Login to staff.imperial.edu

Once you get to <http://staff.imperial.edu> you will see in the top-right of the site a **Login** link. Hover your mouse over this link to bring up the login form and login with your **Domain Credentials** (this is the **first part** of your email address plus your email password, so if your email address is joe.smith@imperial.edu you would enter in **joe.smith** as the username):



Quick Links | Twitter | **Login**

Please use the first part of your IVC Email (e.g. joe.smith) and your Email Password to login.

Username

Password

Remember Me

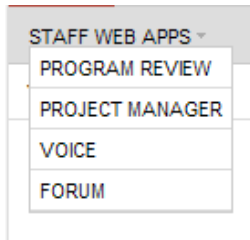
LOGIN

2. Go to the Program Review page within staff.imperial.edu

After you login to <http://staff.imperial.edu> you'll notice that the main menu has changed (at the moment I've only just begun this actual site so it is still really empty, or some links don't actually make sense as the site is still filled with quite a bit of demo content).

Under the **IT** menu item you should see a new link named **Staff Web Apps** (the naming of this might change in the future). If you hover over **Staff Web Apps** you'll see the **Program Review** link. Go ahead and click on it.





3. Make your Org Code Assignment Request via Email

Since Banner **does not assign** individual users to Org Codes, this assignment is handled locally within the application.

In the screenshot below you'll see the screen you would get on your first access of the Program Review application, before you have any Orgs assigned to your account. Since **I can't assign** you an Org Code **before you login** to the **Staff Website** the screen below should allow you to quickly **send me an email with the Org Code(s)** that you handle so that I can make the assignment in the administration area of the application.

Program Review Application

It doesn't look like you've been assigned any Org Codes yet, please contact the [webmaster](#) and inform him/her of the Org Code(s) you normally work with.

4. Start adding line items for your assigned Org Codes

That's about it for setup so that you can get started adding Budget Requests for the upcoming Fiscal Year...below you'll see a screenshot of the entire interface (so far):

Program Review Application

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
101	11001 - Unrestricted - General	6600 - Planning, Policymaking and Coord	1215 - President's Salary
102	11012 - Unrestricted - Accreditation	6610 - Planning, Policymaking and Coord	1490 - Non-Instruction Consultant Salaries
103	11017 - President Office - Grant Expenses	6790 - Other General Inst Support Services	2109 - Night Differential
104	15907 - Staff Development		2119 - Professional Salaries
105			2120 - Secretarial/Clerical Salaries
106			2301 - Student Salaries
107			2398 - Professional Growth Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
101					0		Select Plan	ADD LINE ITEM

[Click Here to Enter in a Longer Justification...](#)

Your Line Items

ID	PRI	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT
1	0	371	11001	1200	1110	continuing cost ...	\$659,237.39	\$568,094.40	\$2,000
Used Total: \$659,237.39							Budgeted Total: \$568,094.40		Total: \$2,000.00

From: [Linda Amidon](#)
To: [Patrick Pauley](#); [David Zielinski](#); [Mary Carter](#); [Carol Lee](#); [Lianna Zhao](#); [Cathy Zazueta](#); [Suzanne Gretz](#); [Ted Ceasar](#); [Carlos Fletes](#); [Larry Valenzuela](#)
Subject: FW: Updated Program Review App Documentation
Date: Thursday, September 24, 2009 4:57:00 PM
Attachments: [Program Review Application Documentation.pdf](#)
[Adding Budget Requests Documentation.pdf](#)

Here's the email that Tina sent regarding the annual budget/program review application.

Linda

From: Tina Aguirre
Sent: Tuesday, September 22, 2009 8:56 PM
To: Administrative Council Members; Division Secretaries; Division Chairs; Deans Of Instruction; Deans of Instruction Secretaries; Linda Amidon; Kevin White; Michael Heumann; Toni Pfister
Subject: FW: Updated Program Review App Documentation

This email is meant for anyone who is responsible for a program review and their support staff.

Attached are two files for the training scheduled for **Thursday September 24 at 3:00 p.m. and Friday September 25 at 11:45 a.m.** Both training sessions will take place in **Room 2131**. The attached files refer to the new Staff Website: : <http://staff.imperial.edu>

We are asking for you and your support staff to learn how to enter data into the new form as we will all need help to meet the following deadlines.

10/26/09 Complete ALL program reviews for 2010-2011 (annual and comprehensive). This requires projecting the schedules for the entire year (2010-2011) and using the Enlighten enrollment tool.

11/17/09 ALL 2010-2011 program reviews must be submitted and reviewed by ALL 'Plan Committees' ; i.e. technology, staffing, facilities, etc. This is where the shared governance begins in this process and recommendations go to GEN O

12/12/09 ALL 2010-2011 program reviews must be submitted and reviewed by College Council and/or Academic Senate. This is the second step for shared governance. Additional recommendations will be considered for GEN O

Jan 2010 Division Chairs will finalize GEN 1 based on the all the prior steps and forward to ...

Feb 2010 Planning and Budget Committee and Finance Dept will review GEN 1 and determine if further changes needed based on fiscal status

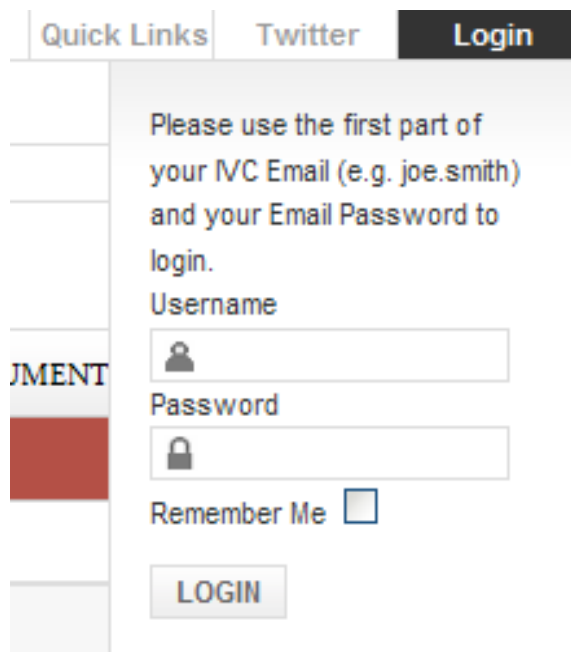
Mar/Apr 10 GEN 1 or 2 will be prepared for submittal to the Board

May/Jun 10 Budget approved and Divisions aware.

Program Review Application

1. Login to staff.imperial.edu

Once you get to <http://staff.imperial.edu> you will see in the top-right of the site a **Login** link. Hover your mouse over this link to bring up the login form and login with your **Domain Credentials** (this is the **first part** of your email address plus your email password, so if your email address is joe.smith@imperial.edu you would enter in **joe.smith** as the username):



Quick Links | Twitter | **Login**

Please use the first part of your IVC Email (e.g. joe.smith) and your Email Password to login.

Username

Password

Remember Me

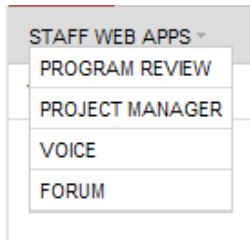
LOGIN

2. Go to the Program Review page within staff.imperial.edu

After you login to <http://staff.imperial.edu> you'll notice that the main menu has changed (at the moment I've only just begun this actual site so it is still really empty, or some links don't actually make sense as the site is still filled with quite a bit of demo content).

Under the **IT** menu item you should see a new link named **Staff Web Apps** (the naming of this might change in the future). If you hover over **Staff Web Apps** you'll see the **Program Review** link. Go ahead and click on it.





3. Make your Org Code Assignment Request via Email

Since Banner **does not assign** individual users to Org Codes, this assignment is handled locally within the application.

In the screenshot below you'll see the screen you would get on your first access of the Program Review application, before you have any Orgs assigned to your account. Since **I can't assign** you an Org Code **before you login** to the **Staff Website** the screen below should allow you to quickly **send me an email with the Org Code(s)** that you handle so that I can make the assignment in the administration area of the application.

Program Review Application

It doesn't look like you've been assigned any Org Codes yet, please contact the [webmaster](#) and inform him/her of the Org Code(s) you normally work with.

4. Start adding line items for your assigned Org Codes

That's about it for setup so that you can get started adding Budget Requests for the upcoming Fiscal Year...below you'll see a screenshot of the entire interface (so far):

Program Review Application

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
101	11001 - Unrestricted - General	6600 - Planning, Policymaking and Coord	1215 - President's Salary
102	11012 - Unrestricted - Accreditation	6610 - Planning, Policymaking and Coord	1490 - Non-Instruction Consultant Salaries
103	11017 - President Office - Grant Expenses	6790 - Other General Inst Support Services	2109 - Night Differential
104	15907 - Staff Development		2119 - Professional Salaries
105			2120 - Secretarial/Clerical Salaries
106			2301 - Student Salaries
107			2398 - Professional Growth Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
101					0		Select Plan	ADD LINE ITEM

[Click Here to Enter in a Longer Justification...](#)

Your Line Items

ID	PRI	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT
1	0	371	11001	1200	1110	continuing cost ...	\$659,237.39	\$568,094.40	\$2,000
Used Total: \$659,237.39							Budgeted Total: \$568,094.40		Total: \$2,000.00

Your Line Item Sum is: \$2,000

Adding Budget Requests

1. Select the Codes for your Line Item:

In the screenshot below you'll see the interface for **Step 1** of the application. You'll automatically have your first Org Code selected in the **Your Org Codes** section, along with the **Previously Used Fund, Program, and Account Codes** for that Org Code (that is, the codes that have been used previously when creating budget requests in previous years).

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261 352 371 508 509	11001 - Unrestricted - General 11002 - Summer School 11003 - Summer 2 11301 - DSPS Matching Funds 11501 - Lottery Unrestricted 115018 - Lottery Unrestricted c/o 11502 - Lottery Instructional Materials	1000 - Fine and Applied Arts 1100 - Foreign Language 6190 - Other Instructional Support	1110 - Instruction Regular Salaries 1270 - Chair/Coordinator Salaries 1320 - FT Summer Teaching 1325 - FT Winter Teaching 1330 - Adjunct Faculty Salaries 1340 - Overload Full-Time Faculty Salaries 2120 - Secretarial/Clerical Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

You may also notice the big red bar that says **“Click Here to see last year’s budget requests for the selected ORG Code”** if you click on this bar it will display a **sortable** table with all of last year’s Budget Requests, ordered by Budget Phase, Fund, Program, Account.

My thought here is that having this table available will help in the addition process since you would quickly be able to see what was put into the budget last year (particularly, you would be able to see **which FOAPAL combinations you used last year**).

Due its size, you’ll see a screenshot of this table on the next page.

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261 352 371 508 509	11001 - Unrestricted - General 11002 - Summer School 11003 - Summer 2 11301 - DSPS Matching Funds 11501 - Lottery Unrestricted 115018 - Lottery Unrestricted c/o 11502 - Lottery Instructional Materials	1000 - Fine and Applied Arts 1100 - Foreign Language 6190 - Other Instructional Support	1110 - Instruction Regular Salaries 1270 - Chair/Coordinator Salaries 1320 - FT Summer Teaching 1325 - FT Winter Teaching 1330 - Adjunct Faculty Salaries 1340 - Overload Full-Time Faculty Salaries 2120 - Secretarial/Clerical Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

Total Line Item Sum for GEN1: \$63,094
Total Line Item Sum for GEN2: \$2,213,660
Total Line Item Sum for GEN4: \$2,709,040
Total Line Item Sum for GEN5: \$2,303,518
Total Line Item Sum for GEN6: \$2,303,518
Total Sum for all Budget Phases: \$9,592,830

#	Phase	ORG	FUND	PROGRAM	ACCOUNT	Account Description	Amount	Date	Banner User
338	GEN1	261	11001	1000	4320	Instructional Supplies and Material	\$8,000	2009-03-30	JESSICA_WADDELL
337	GEN1	261	11001	1000	4325	Music Supplies	\$5,000	2009-03-30	JESSICA_WADDELL
336	GEN1	261	11001	1000	4340	Media Materials	\$3,500	2009-03-30	JESSICA_WADDELL
335	GEN1	261	11001	1000	4401	Non-Instructional Supply / Material	\$4,100	2009-03-30	JESSICA_WADDELL
334	GEN1	261	11001	1000	4455	Copying/Printing	\$12,000	2009-03-30	JESSICA_WADDELL
333	GEN1	261	11001	1000	4460	Office Supplies	\$5,000	2009-03-30	JESSICA_WADDELL
332	GEN1	261	11001	1000	4461	Copier Supplies	\$1,500	2009-03-30	JESSICA_WADDELL
331	GEN1	261	11001	1000	5110	Consulting Services	\$5,000	2009-03-30	JESSICA_WADDELL
330	GEN1	261	11001	1000	5190	Models	\$1,000	2009-03-30	JESSICA_WADDELL
329	GEN1	261	11001	1000	5220	Travel - Staff Conferences	\$4,800	2009-03-30	JESSICA_WADDELL
328	GEN1	261	11001	1000	5540	Telephone and Data Lines	\$150	2009-03-30	JESSICA_WADDELL
327	GEN1	261	11001	1000	5621	Copier Maintenance Agreements	\$2,400	2009-03-30	JESSICA_WADDELL
326	GEN1	261	11001	1000	5640	Equipment Repairs	\$2,000	2009-03-30	JESSICA_WADDELL
325	GEN1	261	11001	1000	5860	Postage	\$1,000	2009-03-30	JESSICA_WADDELL
324	GEN1	261	11001	1000	6490	Equipment - New Eqp under 5000	\$7,644	2009-03-30	JESSICA_WADDELL
323	GEN2	261	11001	1000	1110	Instruction Regular Salaries	\$610,700	2009-07-01	CARLOS_FLETES
322	GEN2	261	11001	1000	1270	Chair/Coordinator Salaries	\$69,727	2009-07-01	CARLOS_FLETES
321	GEN2	261	11001	1000	1330	Adjunct Faculty Salaries	\$234,360	2009-07-01	CARLOS_FLETES

2. Enter in the amount, a short justification, the priority and select a plan for your Line Item:

As you select Previously Used Fund, Program, and Account Codes from the list boxes in Step 1 you'll notice that the **text boxes** in Step 2 will **automatically fill in** for each of those as shown below:

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
261	11001	1000	1110		0		Select Plan	ADD LINE ITEM

[Click Here to Enter in a Longer Justification...](#)

Unless you need to use a Fund, Program, or Account Code that you've never used before you won't need to do anything besides select from the lists of previously used codes, but should the need arise to use a **new code**, just enter it into the text box and everything should be fine (**in other words, you are not limited to using only those codes which you have used before**).

The main part of Step 2 is entering in **an amount, a short justification (255 characters or less) and selecting a priority and Plan** from the dropdown list and then **clicking** on the **Add Line Item** button.

AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
	9	Required in order for th	Staffing	ADD LINE ITEM

Current Plan List:

PLAN
Select Plan
Select Plan
Facilities
Marketing
Professional Development
Routine Operational Cost
SLO
Staffing
Technology

The other part (which you probably don't want to worry about normally to make line item addition quicker) is the **long justification toggle**:

The screenshot shows a rich text editor window with a red header bar that says "Click Here to Enter in a Longer Justification...". Below the header is a toolbar with various icons for text formatting, alignment, and insertion. The main area is a large, empty text box. At the bottom, there are tabs for "Design", "Source", and "Preview", and a footer that says "Use Shift+Enter for a
 tag".

3. Modifying Line Items

I didn't want to pollute the database on the staff website with test entries so the screenshots below are from my testing server:

At the beginning the Your Line Items area will look like the following since it will not have anything just yet:

Your Line Items

But as you add entries you'll begin to see a table being created:

Your Line Items							Your Line Item Sum is: \$2,351,394		
ID	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT	
63	261	11701	6190	3220	ya ya...	\$0.00	\$0.00	\$100	
62	261	11701	1000	3110	Testing the new justifica...	\$9,797.80	\$7,485.00	\$10,000	
61	261	11301	1000	3110	Testing new account code ...	\$6,909.54	\$8,576.00	\$10,000	
60	261	11002	1100	3110	Testing new account code ...	\$1,721.86	\$2,433.00	\$10,000	
59	261	11001	1000	1270	Testing the new previous ...	\$67,731.88	\$67,382.00	\$15,000	
58	261	11301	1000	1110	Updated Line Items Table ...	\$63,539.75	\$0.00	\$100,000	
57	261	11001	1100	1110	asdf...	\$324,758.20	\$0.00	\$12,150	
56	261	11001	1000	1110	Testing the previous year...	\$596,237.62	\$0.00	\$540,000	
55	261	11003	6190	3430	Updated Line Items Table ...	\$0.00	\$0.00	\$54,000	
54	261	16301	1000	3430	...	\$0.00	\$0.00	\$130,000	
53	261	11001	6190	4321	...	\$0.00	\$0.00	\$19,000	
52	261	15105	1000	3510	...	\$0.00	\$0.00	\$150,000	
51	261	11502	1100	3430	...	\$0.00	\$0.00	\$1,250	
50	261	16301	6190	6490	...	\$0.00	\$0.00	\$10,994	
49	261	16301	1000	6490	...	\$0.00	\$0.00	\$11,500	
48	261	16301	1000	5110	...	\$0.00	\$0.00	\$1,500	
47	261	115028	1100	5220	...	\$0.00	\$0.00	\$115,400	
46	352	11701	0500	4340	...	\$0.00	\$0.00	\$1,500	
45	261	11003	1100	1270	...	\$0.00	\$0.00	\$10,000	
44	261	115028	1000	3411	...	\$0.00	\$0.00	\$585,000	
43	261	15105	1100	5190	...	\$0.00	\$0.00	\$15,000	
42	261	11003	1000	1320	...	\$0.00	\$0.00	\$15,000	
41	261	11301	1100	1270	...	\$0.00	\$0.00	\$15,000	
40	261	11002	1000	5110	...	\$0.00	\$0.00	\$515,500	
39	261	11501	1100	3410	...	\$0.00	\$0.00	\$1,500	
38	261	16301	6190	6129	...	\$0.00	\$0.00	\$1,000	
1	352	15105	0500	3420	...	\$0.00	\$0.00	\$1,000	
						Used Total: \$1,070,696.65	Budgeted Total: \$85,876.00	Total: \$2,351,394.00	

On the right-side of the table you'll see the following columns: Used, Budgeted, and Amount. The **Used** and **Budgeted** figures come from the last **completed** fiscal year's operating ledger, while the **Amount** column contains the figures you just entered into the program. Hopefully the extra Used and Budgeted columns will help for comparing the new figures with previous years.

Additionally, you may notice the links within the **ID** and **Justification** columns. When clicked on, each of these will popup a screen that will allow you to modify the Amounts+Plan or Short and Long Justifications, respectively. Not shown above as it was recently added is the **Priority** column, which is displayed next to the **ID** field on the left side of the table.

Here is an example of the Amount+Plan edit screen:

11701 0500 3110 Test Priority (but no pri... \$3,103.24 \$3,268.00

Edit Line Item:

AMOUNT	PRIORITY	PLAN	
10000	0	Marketing	Update Line Item

Detailed FOAPAL Description:

Type	Code	Description
Fund	11701	Winter Intersession
Org	261	Humanities
Account	3110	STRS Certificated Instructional
Program	1000	Fine and Applied Arts

Adjustment History:

#	PRI	Description	Amount	Created	Modified By
2	0	EDITED PLAN TO Marketing	\$10,000	2009-09-17 17:34:49	omar.ramos
1	0	ADDED LINE ITEM	\$10,000	2009-09-16 22:24:18	omar.ramos

Previously Used Amounts for this FOAPAL:

#	FISCAL YEAR	USED	BUDGETED
5	FY10	\$0.00	\$4,009.00
4	FY09	\$9,797.80	\$7,485.00
3	FY08	\$7,186.66	\$7,630.45

Here is an example of the Justifications Edit screen:

301 1000 3110 Testing new account code... \$6,909.54 \$8,576.00

Edit Short and Long Justifications:

Update Line Item

SHORT JUSTIFICATION	UPDATE DESCRIPTION
Testing the new justification description field	

LONG JUSTIFICATION

B I U ABC | Styles Paragraph

Testing the new justification description field

Jul 1, 2010 New budget begins
Sep 2010 Budget revisions to the Board based on state budget changes.

From: Tina Aguirre
To: Omar E. Ramos; Linda Amidon; Suzanne Gretz; Carol Cortes-Pamirez; Dixie Krimm; Elvia Camillo; Emily Deal; Frances Arce-Gomez; Jessica Waddell; Laura Hartsock; Lency Lucas; Leticia Petty; Maria Sell; Ofelia Duarte; Patricia Robles; Rhonda Ruiz; Rosa Chavez; Sandie Noel; Sara Hernandez; Toni Gamboa; Armando Mendez; Bruce Seivertson; Carlos Fletes; Frances Arce-Gomez; Janis Magno; Jessica Waddell; John Abarca; Michael Heumann; Miriam Treio; Norma Nuñez; Rick Webster; Robin Ying; Sergio Lopez; Taylor Ruhl; Ted Caesar; Rick Webster; Bill Gay; Dawn Chun; Ed Gould; John Lau; Kathy Berry; Tina Aguirre; Todd Evangelist; Travis Gregory; Victor Jaime; Vikki Carr; Edward Wells; Sergio Lopez; Gloria Carmona; Elrain Silva; Gonzalo Huerta; David Zielinski; Valerie Rodgers; Janis Magno; Carol Lee; Becky Green; Frances Reope; David Drury; Mary Carter; Melani Guinn; Jose Lopez; Laura Hartsock; Sara Wheat; Lianna Zhao; Marilyn Boyle; Carlos Fletes
Subject: FW: New Program Review App Addition Features
Date: Monday, September 28, 2009 9:57:34 AM
Attachments: [Adding Budget Requests directions.pdf](#)
[New form log on directions.pdf](#)
[Comp Program Review Form Fall 09.doc](#)
[Fall 2010.xlsx](#)
[Spring 2011.xlsx](#)
[Summer 2011.xlsx](#)
[Winter2011.xlsx](#)

For all who will work on Program Reviews.... Thank you ahead of time for all you will be doing over the next month. (please forward if I missed anyone)

PART I – Budget for needs that link to campus resource plans

10/26/09 Last date for completed budget portion for ALL 2010-2011 program reviews

1. Due to the California financial crisis, plan on an approximate 10% reduction compared to your budget in 08-09 budget.
2. Prior to entering data, use the Enlighten files for Summer 2010, Fall 2010, Winter 2011, and Spring 2011 to set the pattern of classes you are proposing for the school year. See excel files attached. Keep in mind the winter and summer sections may be limited as this year.
3. We will be (hopefully) sending out a worksheet that will help with the salary portion too
4. Follow log on directions for this website in the attached pdf files and in the directions at the bottom of the page. Site is:
<http://staff.imperial.edu/>

11/17/09 Last date for ALL 2010-2011 program reviews to be submitted and reviewed by ALL 'Plan Committees'

1. The resource plans are: Technology, Facilities, Staffing, Professional Development, Marketing, SLO, and Planning and Fiscal.
2. The justifications for each of your line items that are tied to a plan will be reviewed by that Plan Committee
3. This is where the shared governance begins in this process and recommendations go to GEN O

12/12/09 By this date ALL 2010-2011 program reviews must have been submitted and reviewed by College Council and/or Academic Senate.

1. Each of the Plan Committees will submit their recommendations to the Council and Senate based on previously set criteria and your justifications for each of your line items
2. This is the second step for shared governance. Additional recommendations will be considered for GEN O

PART 2 – Comprehensive Review (overview of past 3 years and future 3 years)

The new Part 2 for comprehensive review remains in a Word format and will have a standardized format for the initial basic data.

1. Contact Dawn Chun to identify the programs/courses which will require data. She will supply specific data for the past, but the last year will be only ½ as all data sources are not fully complete for year end.
2. You will be analyzing performance of the program goals and objectives based on data and other changes within your programs as well as analyzing projected academic and industry demands/changes. There are three areas in the comprehensive Review form: Past (three academic years), Present, and Future (three academic years).
3. The new form is the attached work file. A sample of a completed form will be coming later.

Other Deadlines

Jan 2010 Division Chairs will finalize GEN 1 based on the all the prior steps and forward to ...
Feb 2010 Planning and Budget Committee and Finance Dept will review GEN 1 and determine if further changes needed based on fiscal status
Mar/Apr 10 GEN 1 or 2 will be prepared for submittal to the Board
May/June 10 Budget approved and Divisions aware.
Jul 1, 2010 New budget begins
Sep 2010 Budget revisions to the Board based on state budget changes.

From: Omar E. Ramos
Sent: Friday, September 25, 2009 7:01 PM
To: Tina Aguirre; Linda Amidon
Subject: New Program Review App Addition Features

Below you'll see a screenshot of the new feature I added that will hopefully make the line item additions go more smoothly (as well as give you an indicator of how much you still have to go).

The last year's budget requests now play a more central role in the addition process so you'll most likely want to toggle it on and leave it on. In the table below you can see that one line item has been marked "USED" because that FOAPAL combination has already been entered in as a line item for the current period.

If you click on the little radio buttons in that column, the Step 2 FUND-PROGRAM-ACCOUNT and AMOUNT figures get updated with the values that are in that row from last year's budget requests.

Earlier today I also added the following features that had been mentioned:

1. Have Org Descriptions shown in the "Your Org Codes" area

2. Have the "Your Line Items" table change when the Org Code is changed
3. Changed the "USED" Column in the "Your Line Items" table to say "ACTUAL" instead.

Step 1: Select codes for line item

Your Org Codes

- 352 - Business
- 353 - Computer Information System
- 354 - Computer Programming
- 355 - Legal Assistant
- 356 - Library Technician
- 357 - Office Technologies
- 371 - Nursing, Health Tech and EM
- 372 - Continuing Education

Previously Used Fund Codes

- 11001 - Unrestricted - General
- 11002 - Summer School
- 11003 - Summer 2
- 11101 - Partnership for Excellence
- 115018 - Lottery Unrestricted c/o
- 11502 - Lottery Instructional Material
- 11701 - Winter Intersession

Previously Used Program Codes

- 1100 - Foreign Language
- 1200 - Health
- 6010 - Academic Administration
- 6190 - Other Instructional Support
- 8000 - Revenue

Previously Used Account Codes

- 2104 - Information Systems Salaries
- 2119 - Professional Salaries
- 2120 - Secretarial/Clerical Salaries
- 2211 - Tutorial Salaries
- 2301 - Student Salaries
- 2398 - Professional Growth Salaries
- 2399 - Overtime and Extra Pay

[Click Here to see last year's budget requests for the selected ORG Code...](#)

Total Line Item Sum for GEN1: \$50,034

Total Line Item Sum for GEN2: \$1,530,468

Total Sum for all Budget Phases: \$1,580,502

<input type="radio"/>	67	GEN1	371	11002	1200	4455	Copying/Printing	\$300	2008-04-25	LAURA_GUDINO		
<input type="radio"/>	66	GEN1	371	11002	1200	5213	Travel - Student Room and Board	\$10,000	2008-04-25	LAURA_GUDINO		
<input type="radio"/>	65	GEN1	371	11701	1200	4320	Instructional Supplies and Material	\$700	2008-04-25	LAURA_GUDINO		
<input type="radio"/>	64	GEN1	371	11701	1200	4455	Copying/Printing	\$300	2008-04-25	LAURA_GUDINO		
<input type="radio"/>	63	GEN1	371	11701	1200	5213	Travel - Student Room and Board	\$10,000	2008-04-25	LAURA_GUDINO		
<input checked="" type="radio"/>	62	GEN2	371	11001	1200	1110	Instruction Regular Salaries	\$558,561	2008-05-15	CARLOS_FLETES		
<input type="radio"/>	61	GEN2	371	11001	1200	1270	Chair/Coordinator Salaries	\$57,550	2008-05-15	CARLOS_FLETES		
<input type="radio"/>	60	GEN2	371	11001	1200	1330	Adjunct Faculty Salaries	\$157,000	2008-05-19	CARLOS_FLETES		
<input type="radio"/>	59	GEN2	371	11001	1200	1340	Overload Full-Time Faculty Salaries	\$127,200	2008-06-12	CARLOS_FLETES		
<input checked="" type="radio"/>	58	GEN2	371	11001	1200	2399	Overtime and Extra Pay	\$500	2008-05-15	CARLOS_FLETES		
<input type="radio"/>	57	GEN2	371	11001	1200	3110	STRS Certificated Instructional	\$73,929	2008-05-15	CARLOS_FLETES		
<input type="radio"/>	56	GEN2	371	11001	1200	3220	PERS Classified Noninstructional	\$47	2008-05-15	CARLOS_FLETES		
<input type="radio"/>	55	GEN2	371	11001	1200	3320	FICA-Classified	\$31	2008-05-15	CARLOS_FLETES		
<input type="radio"/>	54	GEN2	371	11001	1200	2320	Medicare Certificated	\$7,370	2008-05-15	CARLOS_FLETES		

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN
371	11001	1200	2399	500	0		Select Plan

[Click Here to Enter in a Longer Justification...](#)

Omar Ramos
 Webmaster
 Imperial Valley College
 760-355-6500

Part 2 – Comprehensive Program Review

Fall 2009

Program Name:

A. PAST: Review of Program Performance, Objectives, and Outcomes for the Three Previous Academic Years: 2006-07, 2007-08, 2008-09

1. List the objectives developed for this program during the last comprehensive program review.

2. Present program performance data in tabular form for the previous three years that demonstrates the program's performance toward meeting the previous objectives. Include the following standard program performance metrics as well additional program specific metrics, if any.
 - a. For teaching programs this data should include at least the following: Enrollment at census, number of sections, fill rate, retention rate, success rate, and grade distribution for each course in the program, during each semester and session of the previous three academic years. In addition, the Full Time Equivalent Faculty (FTEF) and Full Time Equivalent Students (FTES) and the ratio of FTES per FTEF should be presented for the program for each semester and session.
 - b. For non teaching programs this data should include the following: TBD

3. Present student learning or service area outcomes data that demonstrate the program's continuous educational and/or service quality improvement. Include the following standard information and metrics as well as additional program specific metrics, if any.

List the program level outcomes, goals or objectives and show how these support the Institutional Student Learning Outcomes. Identify the method(s) of assessment used for each of the program level outcomes. Provide a summary of the outcome data for the program, including course and program level data as appropriate.

4. Analyze the data presented visually (graphs, diagrams, etc.) and verbally (text) as appropriate, present any trends, anomalies, and conclusions. Explain the program's success or failure in meeting the objectives presented above in item one. Explain the ways that the program utilized the student learning or service area outcome data presented in item three to improve the program (changes to curriculum, instructional methodology, support services, etc.)

B. PRESENT: Snapshot of the State of the Program in the Current Semester: Fall 2009

1. Give a verbal description of the program as it exists at the present time. Include information on current staffing levels, current student enrollments, student learning or service area outcome implementation, number of majors, and/or other data as appropriate.
2. Verbally describe any outside factors that are currently affecting the program. (For example: changes in job market, changing technologies, changes in transfer destinations, etc.)
3. List any significant issues or problems that the program is immediately facing.

C. FUTURE: Program Objectives for the Next Three Academic Years: 2009-10, 2010-11, 2011-12

1. Identify the program objectives for the next three academic years, making sure these objectives are consistent with the college's Educational Master Plan goals. Include how accomplishment is to be identified or measured and identify the planned completion dates. If any objectives are anticipated to extend beyond this three-year period, identify how much is to be accomplished by the end of this review period and performance measures.
2. Identify how student learning or service area outcomes will be expanded and fully implemented into the program. Include a progress timeline for implementation and program improvement.
3. Identify any resources needed to accomplish these objectives. Identify any obstacles toward accomplishment and the plan to surmount these obstacles.
4. Identify any outside factors that might influence your program during the next three years.

Adding Budget Requests

1. Select the Codes for your Line Item:

In the screenshot below you'll see the interface for **Step 1** of the application. You'll automatically have your first Org Code selected in the **Your Org Codes** section, along with the **Previously Used Fund, Program, and Account Codes** for that Org Code (that is, the codes that have been used previously when creating budget requests in previous years).

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261 352 371 508 509	11001 - Unrestricted - General 11002 - Summer School 11003 - Summer 2 11301 - DSPS Matching Funds 11501 - Lottery Unrestricted 115018 - Lottery Unrestricted c/o 11502 - Lottery Instructional Materials	1000 - Fine and Applied Arts 1100 - Foreign Language 6190 - Other Instructional Support	1110 - Instruction Regular Salaries 1270 - Chair/Coordinator Salaries 1320 - FT Summer Teaching 1325 - FT Winter Teaching 1330 - Adjunct Faculty Salaries 1340 - Overload Full-Time Faculty Salaries 2120 - Secretarial/Clerical Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

You may also notice the big red bar that says **“Click Here to see last year’s budget requests for the selected ORG Code”** if you click on this bar it will display a **sortable** table with all of last year’s Budget Requests, ordered by Budget Phase, Fund, Program, Account.

My thought here is that having this table available will help in the addition process since you would quickly be able to see what was put into the budget last year (particularly, you would be able to see **which FOAPAL combinations you used last year**).

Due its size, you'll see a screenshot of this table on the next page.

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
261 352 371 508 509	11001 - Unrestricted - General 11002 - Summer School 11003 - Summer 2 11301 - DSPS Matching Funds 11501 - Lottery Unrestricted 115018 - Lottery Unrestricted c/o 11502 - Lottery Instructional Materials	1000 - Fine and Applied Arts 1100 - Foreign Language 6190 - Other Instructional Support	1110 - Instruction Regular Salaries 1270 - Chair/Coordinator Salaries 1320 - FT Summer Teaching 1325 - FT Winter Teaching 1330 - Adjunct Faculty Salaries 1340 - Overload Full-Time Faculty Salaries 2120 - Secretarial/Clerical Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

Total Line Item Sum for GEN1: \$63,094
Total Line Item Sum for GEN2: \$2,213,660
Total Line Item Sum for GEN4: \$2,709,040
Total Line Item Sum for GEN5: \$2,303,518
Total Line Item Sum for GEN6: \$2,303,518
Total Sum for all Budget Phases: \$9,592,830

#	Phase	ORG	FUND	PROGRAM	ACCOUNT	Account Description	Amount	Date	Banner User
338	GEN1	261	11001	1000	4320	Instructional Supplies and Material	\$8,000	2009-03-30	JESSICA_WADDELL
337	GEN1	261	11001	1000	4325	Music Supplies	\$5,000	2009-03-30	JESSICA_WADDELL
336	GEN1	261	11001	1000	4340	Media Materials	\$3,500	2009-03-30	JESSICA_WADDELL
335	GEN1	261	11001	1000	4401	Non-Instructional Supply / Material	\$4,100	2009-03-30	JESSICA_WADDELL
334	GEN1	261	11001	1000	4455	Copying/Printing	\$12,000	2009-03-30	JESSICA_WADDELL
333	GEN1	261	11001	1000	4460	Office Supplies	\$5,000	2009-03-30	JESSICA_WADDELL
332	GEN1	261	11001	1000	4461	Copier Supplies	\$1,500	2009-03-30	JESSICA_WADDELL
331	GEN1	261	11001	1000	5110	Consulting Services	\$5,000	2009-03-30	JESSICA_WADDELL
330	GEN1	261	11001	1000	5190	Models	\$1,000	2009-03-30	JESSICA_WADDELL
329	GEN1	261	11001	1000	5220	Travel - Staff Conferences	\$4,800	2009-03-30	JESSICA_WADDELL
328	GEN1	261	11001	1000	5540	Telephone and Data Lines	\$150	2009-03-30	JESSICA_WADDELL
327	GEN1	261	11001	1000	5621	Copier Maintenance Agreements	\$2,400	2009-03-30	JESSICA_WADDELL
326	GEN1	261	11001	1000	5640	Equipment Repairs	\$2,000	2009-03-30	JESSICA_WADDELL
325	GEN1	261	11001	1000	5860	Postage	\$1,000	2009-03-30	JESSICA_WADDELL
324	GEN1	261	11001	1000	6490	Equipment - New Eqp under 5000	\$7,644	2009-03-30	JESSICA_WADDELL
323	GEN2	261	11001	1000	1110	Instruction Regular Salaries	\$610,700	2009-07-01	CARLOS_FLETES
322	GEN2	261	11001	1000	1270	Chair/Coordinator Salaries	\$69,727	2009-07-01	CARLOS_FLETES
321	GEN2	261	11001	1000	1330	Adjunct Faculty Salaries	\$234,360	2009-07-01	CARLOS_FLETES

2. Enter in the amount, a short justification, the priority and select a plan for your Line Item:

As you select Previously Used Fund, Program, and Account Codes from the list boxes in Step 1 you'll notice that **the text boxes** in Step 2 will **automatically fill in** for each of those as shown below:

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
261	11001	1000	1110		0		Select Plan	ADD LINE ITEM

[Click Here to Enter in a Longer Justification...](#)

Unless you need to use a Fund, Program, or Account Code that you've never used before you won't need to do anything besides select from the lists of previously used codes, but should the need arise to use a **new code**, just enter it into the text box and everything should be fine (**in other words, you are not limited to using only those codes which you have used before**).

The main part of Step 2 is entering in **an amount, a short justification (255 characters or less) and selecting a priority and Plan** from the dropdown list and then **clicking** on the **Add Line Item** button.

AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
	9	Required in order for th	Staffing	ADD LINE ITEM

Current Plan List:

PLAN
Select Plan
Select Plan
Facilities
Marketing
Professional Development
Routine Operational Cost
SLO
Staffing
Technology

The other part (which you probably don't want to worry about normally to make line item addition quicker) is the **long justification toggle**:

The screenshot shows a rich text editor window with a red header bar that says "Click Here to Enter in a Longer Justification...". Below the header is a toolbar with various icons for text formatting, alignment, and insertion. The main area is a large, empty text box. At the bottom, there are tabs for "Design", "Source", and "Preview", and a footer that says "Use Shift+Enter for a
 tag".

3. Modifying Line Items

I didn't want to pollute the database on the staff website with test entries so the screenshots below are from my testing server:

At the beginning the Your Line Items area will look like the following since it will not have anything just yet:

Your Line Items

But as you add entries you'll begin to see a table being created:

Your Line Items							Your Line Item Sum is: \$2,351,394		
ID	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT	
63	261	11701	6190	3220	ya ya...	\$0.00	\$0.00	\$100	
62	261	11701	1000	3110	Testing the new justifica...	\$9,797.80	\$7,485.00	\$10,000	
61	261	11301	1000	3110	Testing new account code ...	\$6,909.54	\$8,576.00	\$10,000	
60	261	11002	1100	3110	Testing new account code ...	\$1,721.86	\$2,433.00	\$10,000	
59	261	11001	1000	1270	Testing the new previous ...	\$67,731.88	\$67,382.00	\$15,000	
58	261	11301	1000	1110	Updated Line Items Table ...	\$63,539.75	\$0.00	\$100,000	
57	261	11001	1100	1110	asdf...	\$324,758.20	\$0.00	\$12,150	
56	261	11001	1000	1110	Testing the previous year...	\$596,237.62	\$0.00	\$540,000	
55	261	11003	6190	3430	Updated Line Items Table ...	\$0.00	\$0.00	\$54,000	
54	261	16301	1000	3430	...	\$0.00	\$0.00	\$130,000	
53	261	11001	6190	4321	...	\$0.00	\$0.00	\$19,000	
52	261	15105	1000	3510	...	\$0.00	\$0.00	\$150,000	
51	261	11502	1100	3430	...	\$0.00	\$0.00	\$1,250	
50	261	16301	6190	6490	...	\$0.00	\$0.00	\$10,994	
49	261	16301	1000	6490	...	\$0.00	\$0.00	\$11,500	
48	261	16301	1000	5110	...	\$0.00	\$0.00	\$1,500	
47	261	115028	1100	5220	...	\$0.00	\$0.00	\$115,400	
46	352	11701	0500	4340	...	\$0.00	\$0.00	\$1,500	
45	261	11003	1100	1270	...	\$0.00	\$0.00	\$10,000	
44	261	115028	1000	3411	...	\$0.00	\$0.00	\$585,000	
43	261	15105	1100	5190	...	\$0.00	\$0.00	\$15,000	
42	261	11003	1000	1320	...	\$0.00	\$0.00	\$15,000	
41	261	11301	1100	1270	...	\$0.00	\$0.00	\$15,000	
40	261	11002	1000	5110	...	\$0.00	\$0.00	\$515,500	
39	261	11501	1100	3410	...	\$0.00	\$0.00	\$1,500	
38	261	16301	6190	6129	...	\$0.00	\$0.00	\$1,000	
1	352	15105	0500	3420	...	\$0.00	\$0.00	\$1,000	
						Used Total: \$1,070,696.65	Budgeted Total: \$85,876.00	Total: \$2,351,394.00	

On the right-side of the table you'll see the following columns: Used, Budgeted, and Amount. The **Used** and **Budgeted** figures come from the last **completed** fiscal year's operating ledger, while the **Amount** column contains the figures you just entered into the program. Hopefully the extra Used and Budgeted columns will help for comparing the new figures with previous years.

Additionally, you may notice the links within the **ID** and **Justification** columns. When clicked on, each of these will popup a screen that will allow you to modify the Amounts+Plan or Short and Long Justifications, respectively. Not shown above as it was recently added is the **Priority** column, which is displayed next to the **ID** field on the left side of the table.

Here is an example of the Amount+Plan edit screen:

11701 0500 3110 Test Priority (but no pri... \$3,103.24 \$3,268.00

Edit Line Item:

AMOUNT	PRIORITY	PLAN
10000	0	Marketing

Update Line Item

Detailed FOAPAL Description:

Type	Code	Description
Fund	11701	Winter Intersession
Org	261	Humanities
Account	3110	STRS Certificated Instructional
Program	1000	Fine and Applied Arts

Adjustment History:

#	PRI	Description	Amount	Created	Modified By
2	0	EDITED PLAN TO Marketing	\$10,000	2009-09-17 17:34:49	omar.ramos
1	0	ADDED LINE ITEM	\$10,000	2009-09-16 22:24:18	omar.ramos

Previously Used Amounts for this FOAPAL:

#	FISCAL YEAR	USED	BUDGETED
5	FY10	\$0.00	\$4,009.00
4	FY09	\$9,797.80	\$7,485.00
3	FY08	\$7,186.66	\$7,630.45

Here is an example of the Justifications Edit screen:

301 1000 3110 Testing new account code... \$6,909.54 \$8,576.00

Edit Short and Long Justifications:

Update Line Item

SHORT JUSTIFICATION	UPDATE DESCRIPTION
Testing the new justification description field	

LONG JUSTIFICATION

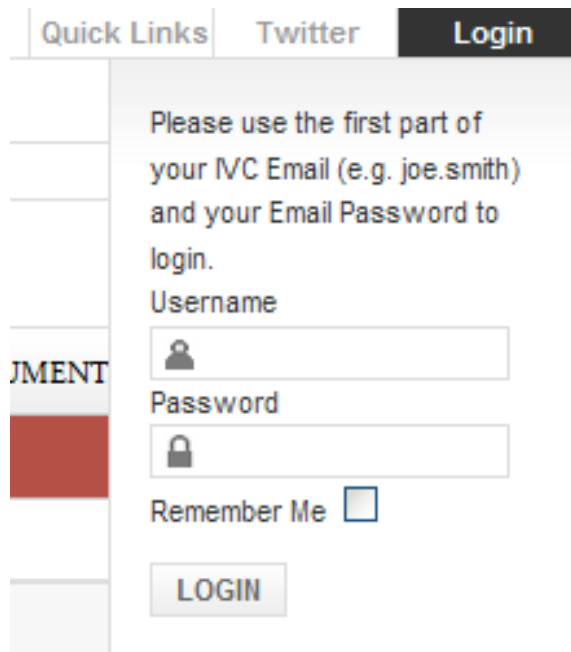
B I U ABC | [List Icons] | Styles | Paragraph | [List Icons] | [List Icons] | HTML

Testing the new justification description field

Program Review Application

1. Login to staff.imperial.edu

Once you get to <http://staff.imperial.edu> you will see in the top-right of the site a **Login** link. Hover your mouse over this link to bring up the login form and login with your **Domain Credentials** (this is the **first part** of your email address plus your email password, so if your email address is joe.smith@imperial.edu you would enter in **joe.smith** as the username):



Quick Links | Twitter | **Login**

Please use the first part of your IVC Email (e.g. joe.smith) and your Email Password to login.

Username

Password

Remember Me

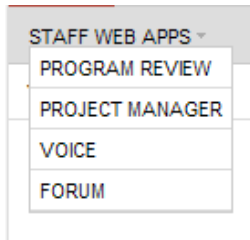
LOGIN

2. Go to the Program Review page within staff.imperial.edu

After you login to <http://staff.imperial.edu> you'll notice that the main menu has changed (at the moment I've only just begun this actual site so it is still really empty, or some links don't actually make sense as the site is still filled with quite a bit of demo content).

Under the **IT** menu item you should see a new link named **Staff Web Apps** (the naming of this might change in the future). If you hover over **Staff Web Apps** you'll see the **Program Review** link. Go ahead and click on it.





3. Make your Org Code Assignment Request via Email

Since Banner **does not assign** individual users to Org Codes, this assignment is handled locally within the application.

In the screenshot below you'll see the screen you would get on your first access of the Program Review application, before you have any Orgs assigned to your account. Since **I can't assign** you an Org Code **before you login** to the **Staff Website** the screen below should allow you to quickly **send me an email with the Org Code(s)** that you handle so that I can make the assignment in the administration area of the application.

Program Review Application

It doesn't look like you've been assigned any Org Codes yet, please contact the [webmaster](#) and inform him/her of the Org Code(s) you normally work with.

4. Start adding line items for your assigned Org Codes

That's about it for setup so that you can get started adding Budget Requests for the upcoming Fiscal Year...below you'll see a screenshot of the entire interface (so far):

Program Review Application

Step 1: Select codes for line item

Your Org Codes	Previously Used Fund Codes	Previously Used Program Codes	Previously Used Account Codes
101	11001 - Unrestricted - General	6600 - Planning, Policymaking and Coord	1215 - President's Salary
102	11012 - Unrestricted - Accreditation	6610 - Planning, Policymaking and Coord	1490 - Non-Instruction Consultant Salaries
103	11017 - President Office - Grant Expenses	6790 - Other General Inst Support Services	2109 - Night Differential
104	15907 - Staff Development		2119 - Professional Salaries
105			2120 - Secretarial/Clerical Salaries
106			2301 - Student Salaries
107			2398 - Professional Growth Salaries

[Click Here to see last year's budget requests for the selected ORG Code...](#)

Step 2: Enter in the amount for this line item and choose a plan

ORG	FUND	PROGRAM	ACCOUNT	AMOUNT	PRIORITY	SHORT JUSTIFICATION	PLAN	
101					0		Select Plan	ADD LINE ITEM

[Click Here to Enter in a Longer Justification...](#)

Your Line Items

ID	PRI	ORG	FUND	PROGRAM	ACCOUNT	JUSTIFICATION	USED	BUDGETED	AMOUNT
1	0	371	11001	1200	1110	continuing cost ...	\$659,237.39	\$568,094.40	\$2,000
Used Total: \$659,237.39							Budgeted Total: \$568,094.40		Total: \$2,000.00

Your Line Item Sum is: \$2,000