Reference Guide

Budget Detail Form – Requests

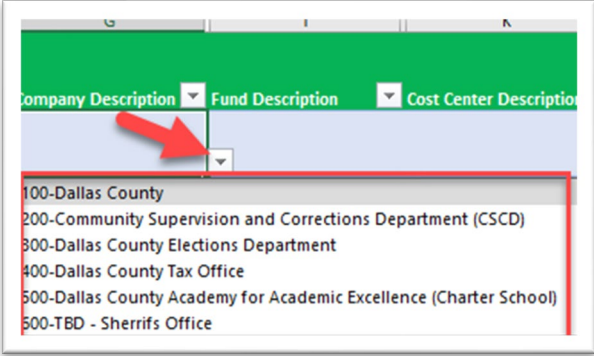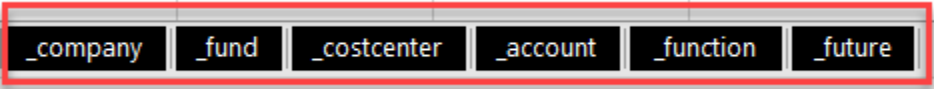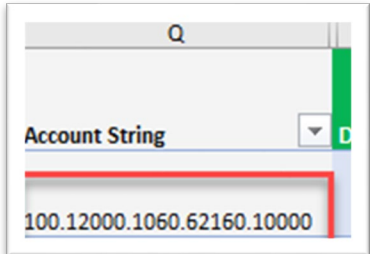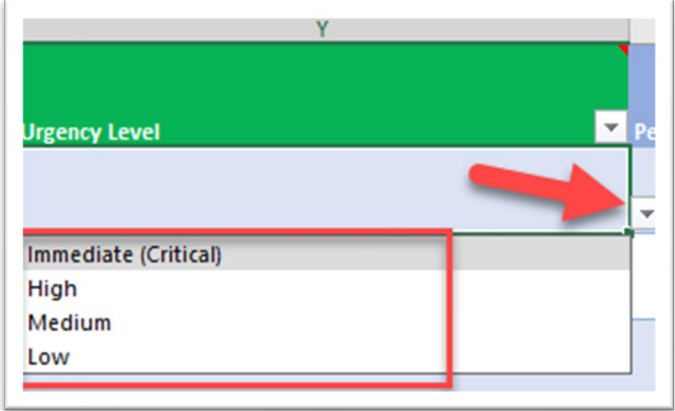The "Request Tab" is a comprehensive tool for detailing every department's budget requests. For accurate budget request submissions, thoroughly complete each column according to these instructions. Consult the budget manual for detailed criteria and guidelines. Follow this guide to accurately fill out each column:
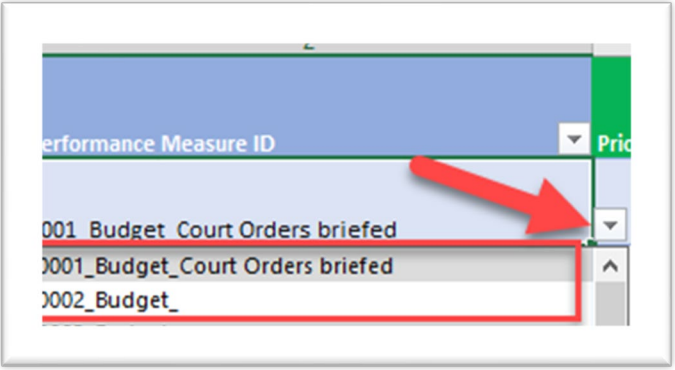
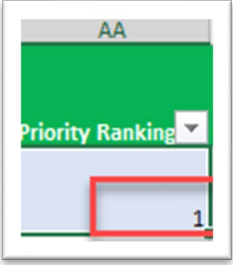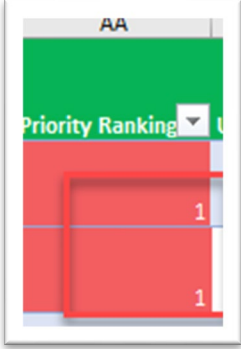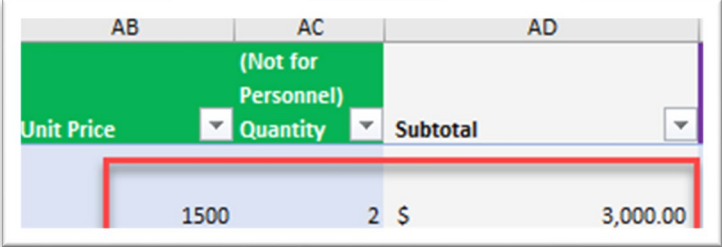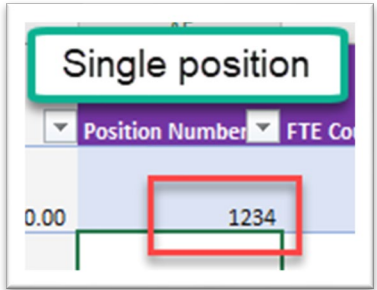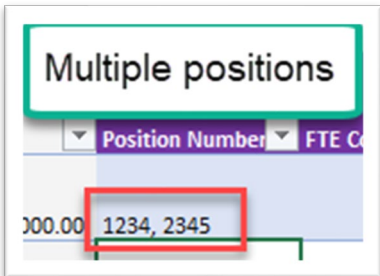|		
🔒	1	**Request ID (Column A):** This is automatically generated and locked. No action required.
🔒	2	**Total Cost (Column B):** Sum of costs for the request on this row; automatically calculated and locked.
🔵	3	**Category (Column C):** Use the dropdown to select if the request is routine/operational or a program improvement. Refer to the budget manual for criteria.
🔵	4	**Subcategory (Column D):** Choose the appropriate subcategory for your budget request from the dropdown, e.g., personnel, operational, or capital.

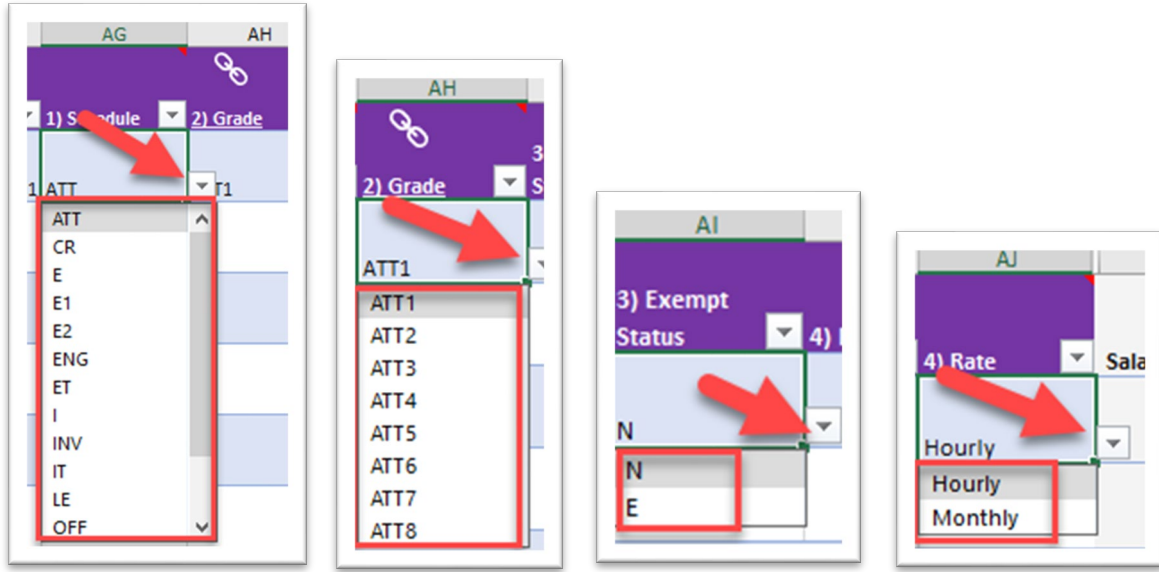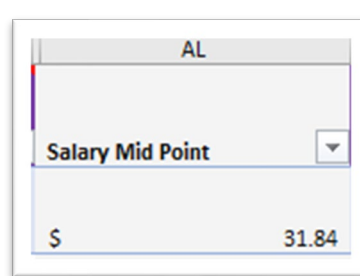|		
●	5	**Requester Name (Column E)**: Enter the name of the individual who can provide details about the request.
●	6	**Physical Address (Column F)**: Specify the location for the item requested, including building, full address, suite, and room number.
●	7	**Charge Account Information (Columns G-O)**: Identify the company, fund, cost center, account, and function for the request. These fields guide where the request should be charged. • A list of all segment values are located on the tabs at the end of the workbook
🔒	8	**Account String (Column Q)**: Combines information from Columns G-O into a general ledger format; automatically generated and locked.
●	9	**Division (Column V) [Optional]**: Identify the division within the department making the request.
●	10	**Request (Column W)**: Provide a concise name/description of what is being requested.
●	11	**Justification (Column X)**: Describe the need behind the request, its alignment with department objectives, and the county's mission, vision, and values.

| 12	**Urgency Level (Column Y)**: Select from the dropdown the urgency level, ranging from critical to low. Definitions and criteria are in the budget manual's [appendix](#).
13	**Performance Measure ID (Column Z)**: Select the relevant performance measure ID that the budget request supports, from the dropdown.

| 14	**Priority Ranking (Column AA)**: Numerically rank the importance of each request.
	• Ensure no two requests share the same ranking to avoid highlighted errors.
15	**Unit Price (Column AB)**: Enter the cost for a single unit of the item requested.
16	**Quantity (Column AC)**: Specify the number of units requested.
17	**Subtotal (Column AD)**: Automatically calculated based on unit price and quantity; locked.
18	**Position Number (Column AE)**: Enter the number(s) for the position(s) being modified. If multiple positions with the same titles and grades are being reclassified, they may be entered here.

	19	**FTE Count (Column AF):** Indicate the full-time equivalent count for the request.
	20	**Salary Schedules (Columns AG-AJ):** Complete these columns in order from left to right to specify salary schedule, grade, exempt status, and rate of pay for personnel requests. For more information, refer to the salary schedule.
	21	**Salary Midpoint (Column AL):** Automatically calculated based on input from Columns AG-AJ; locked.

| 22	**Associated IT Hardware, Vehicle, Training/Certification, and Furniture Requests (Columns AM-AP)**: Use these to link related requests by entering the request ID from another row.

- Find the associated request_id
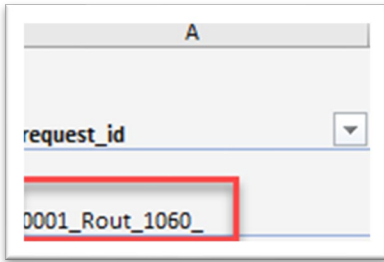
- Click on the cell containing the value and copy the value in the cell using Ctrl + C or right-click and click "Copy"
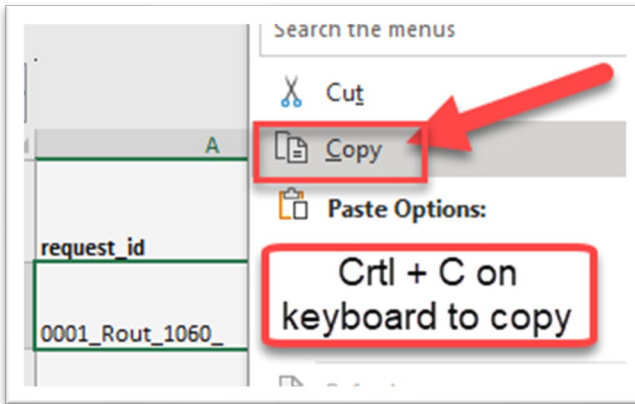
- Select the cell to paste the value, right-click and select "Paste Values"
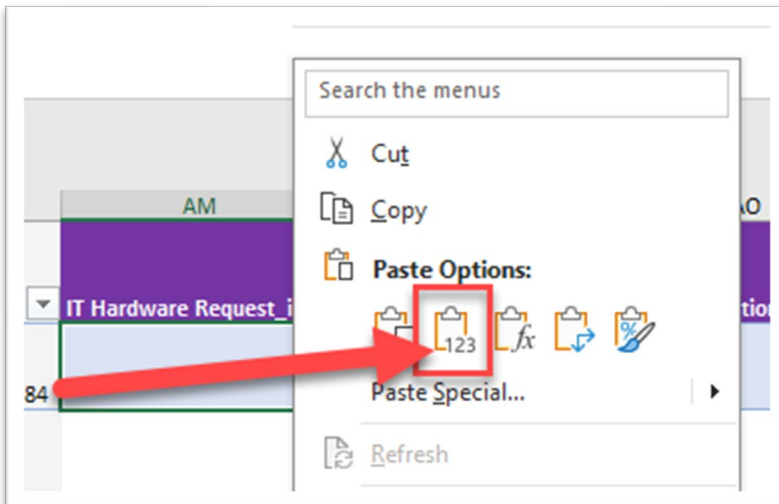
23	**Benefit Calculations (Columns AQ-AU)**: FICA, Medicare, insurance employer contribution, fringe benefits for retirement, and personnel subtotal are automatically calculated; locked.

- **NOTE**: All personnel fields must be completed for these fields to calculate

	AQ	AR	AS	AT	AU
	FICA	Medicare	Insurance - Employe	Fringe Benefits Retiremen	Personnel Subtota
	$ 492.84	$ 115.26	$ 9,800.00	$ 1,033.37	$ 124,885.33