

HOW TO FILL OUT A BUDGET SETUP FORM

A clear, step-by-step guide

November 14, 2025

STEP 1 – ACCESS SOFTDOCS

Softdocs can be accessed using the mycampus portal
MyCampus –SoftDocs- Forms- Budget-Set-up

The screenshot displays the mycampus.uvi.edu/UVI-PROD-U8/Home portal. The browser address bar shows the URL. The page features a search bar and navigation icons. The main content area includes a 'UVI Highlights' section with a banner image of a building and the text 'Welcome to the University of the Virgin Islands'. The 'QuickLaunch' sidebar on the right contains a grid of application tiles. The 'Softdocs' tile is highlighted with a red border.

UVI Highlights

Welcome to the University of the Virgin Islands

The University of the Virgin Islands (UVI) is a student-centered institution devoted to excellence, inno...

QuickLaunch

EMS
Room Reservations & Scheduling - EMS

Databases

SmartEvals

Softdocs

Softdocs

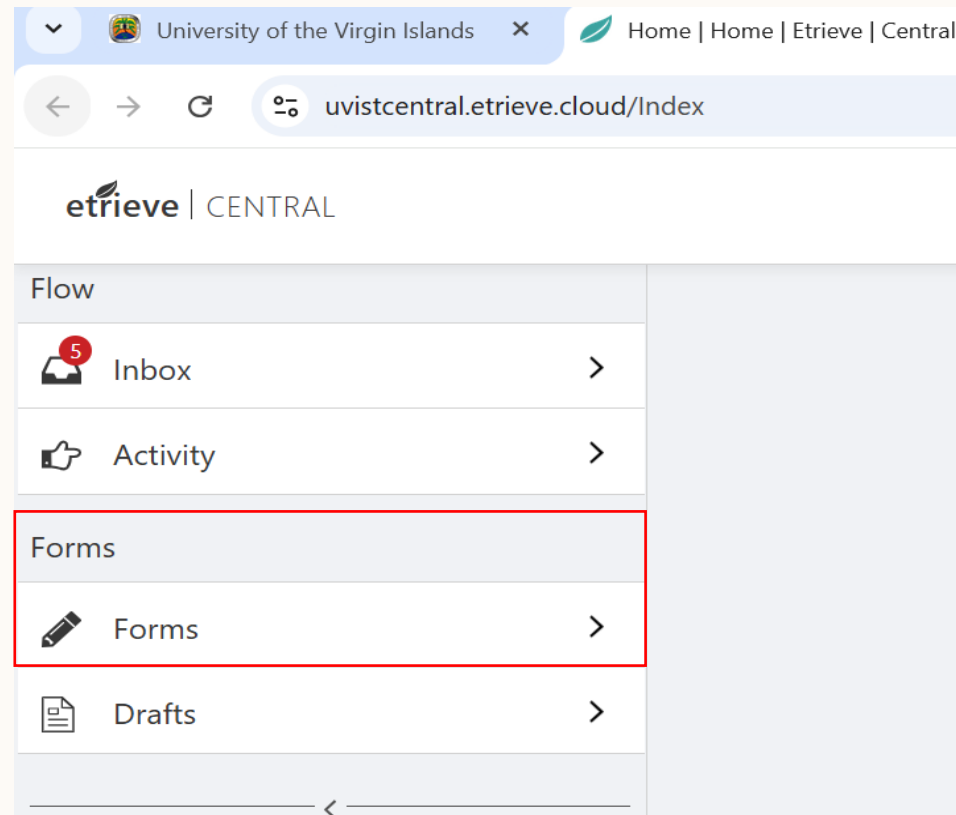
SOS University

SurveyMonkey

UVI Resources

SOFTDOCS FORM





- MyCampus –**SoftDocs**- Forms- Budget-Set-up



SOFTDOCS FORM

- MyCampus –SoftDocs- Forms- **Budget-Set-up**

etrieve | CENTRAL

Flow	Forms
 5 Inbox >	
 Activity >	
Forms	
 Forms >	
 Drafts >	

Forms ×

Budget Forms ▼ COLLAPSE ALL ▲

- FI - Budget Change Request
- FI - Change in Accounts Form

Finance Forms ▼

- FI - Request for Travel Authorization
- Grants Budget Setup

STEP 2- ENTER BASIC DETAILS

- It is essential that the person filling out the form inputs the Department Internal Number and Document Number with complete accuracy (Department generated - used for your internal tracking (Optional)).



Department Internal No. Document #

ACC1 B125126



Accounting Office
Budget Set Up Form

Fiscal Year:

STEP 3- ENTER BASIC DETAILS

The Fiscal Year, Fund Number, Org, Activity, and Date must all be entered correctly, as each field is required for proper processing.

You may select Federal, Local, Private, or Other when relevant; this section is optional and should only be completed if it applies to your budget.

Fiscal Year:

2026

Fund:

260- TEST

Org:

10

Activity:

000

Date:

10/30/2025

☐ Federal

☐ Local

☒ Private

☐ Other

STEP 4- TOTAL AND APPROVALS

The total, which is the overall amount the department is seeking for this budget request computes automatically.

TOTAL BUDGET 448.00

Approved By:

Prepared By:

Approvals

☒ Department Head

Department Head Name: Department Head Email:

☒ Grant Accounting

Grant Accounting Name: Grant Accounting Email:

Please list your assigned Grant Accountant Name; if applicable.

TOTAL BUDGET 448.00

Approved By:

Prepared By:

Approvals

☒ Department Head

Department Head Name: Department Head Email:

☒ Grant Accounting

Grant Accounting Name: Grant Accounting Email:

Approval checkboxes must be selected. Be sure to check “Department Head” and “Grant Accounting”, “PI” and “Title III”, where required. At a minimum, Department Head and Accounting is required.

COMMON MISTAKES TO AVOID

- Using incorrect account codes
- Missing supporting documentation
- Forgetting approver details





**THANK
YOU**

Accounting Department