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

SOFTDOCS FORM

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

SOFTDOCS FORM

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

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.

ACC1

Document #

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.

Please list your assigned Grant Accountant Name; if applicable.
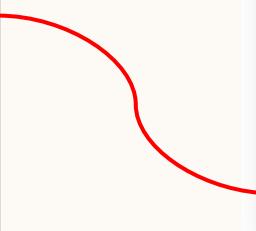
Approval checkboxes must be selected. Be sure to check "Department Head" and "Grant Accounting", "PI" and "Title III", where required. At a minimum, Department Head and Accounting is required.

COMMON MISTAKES TO AVOID

- Using incorrect account codes

- Missing supporting documentation

- Forgetting approver details

THANK YOU

Accounting Department