

REQUEST FOR BUDGET CHANGE (RBC)



USER GUIDE

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Log On:

- **Site URL:** <https://apps.utsystem.edu/RBChange>
- Users will be presented with a screen similar to the one shown below. Select appropriate institution from the drop down box and click the *Select* button

THE UNIVERSITY of TEXAS SYSTEM
Nine Universities. Six Health Institutions. Unlimited Possibilities.

Select your home institution

The service you are trying to reach requires that you authenticate with your home institution. Please either select it from the list below, then click 'Select', or you may use the search-as-you-type feature by typing a partial name into the search box below, then clicking 'Search'.

Please do not create a bookmark or favorite in your web browser on this page. This page is not part of the application you are accessing. You may create a bookmark/favorite after you complete the authentication process.

Enter organization name (partials ok):

Or choose from a list:

The University of Texas at Arlington	Select	Remember for session
The University of Texas at Austin		
The University of Texas at Brownsville		
The University of Texas at Dallas		
The University of Texas at El Paso		
The University of Texas at San Antonio		
The University of Texas at Tyler		
The University of Texas Health Science Center at Houston		
The University of Texas Health Science Center at San Antonio		
The University of Texas Health Science Center at Tyler		
The University of Texas Investment Management Company		
The University of Texas M.D. Anderson Cancer Center		
The University of Texas Medical Branch at Galveston		
The University of Texas of the Permian Basin		
The University of Texas Rio Grande Valley		
The University of Texas Southwestern Medical Center		
The University of Texas System Administration		
The University of Texas-Pan American		
U.T. System Guests		
ZZZZ_TEST_ONLY_The University of Texas-Pan American		
ZZZZ_TEST_ONLY_The University of Texas at El Paso		
ZZZZ_TEST_ONLY_The University of Texas at Tyler		
ZZZZ_TEST_ONLY_The University of Texas Health Science Center at Houston		

- the login screen will appear - enter the **institution** user ID and password
- the user will then be directed to the RBC Site – (see next page)
- **do not add to Favorites until this page is accessed**



Tip: If the user happens to select the wrong institution, close all instances of browsers and launch a new browser session. If "Remember for 1 week" was selected, the will have to also have to clear cache.

Sherill Franke can be contacted with any technical questions. Contact information is noted below:

Sherill Franke
512.499.4558
sfranke@utsystem.edu

Navigate the Main Page:



Homepage – returns user to the main screen

My Profile – used to change roles when appropriate

Pending Requests – same as homepage

Add RBC – select to create a new RBC

Search – *new search feature* [institutions will only see their RBCs when searching]

Reports – not used at this time

Logoff – use to log off but closing browser works too

Below is a screen shot of the main page of the RBC site. User will see all RBCs in progress for their institution. RBCs requiring action by the user are highlighted in yellow.



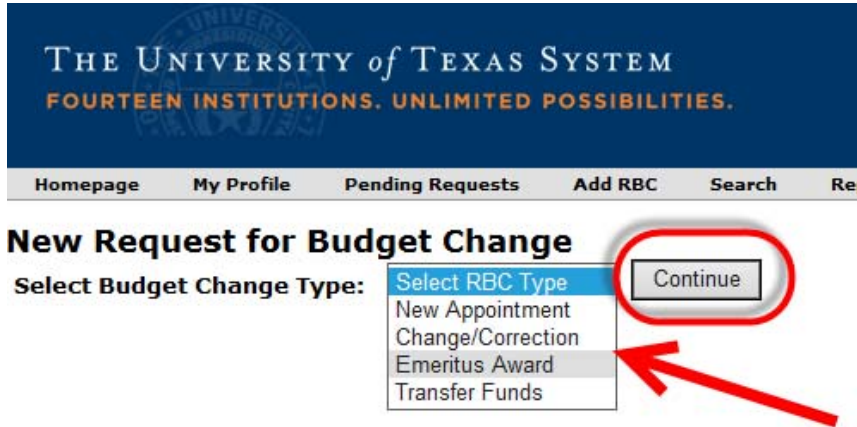
[Add RBC](#)

Pending Requests								
RBC#	FY	Institution	Type Change	Consent Agenda	Last Name	First Name	Middle Name	Last Routed Forward By
4552	FY 13-14	U. T. System Administration	Change/Correction	<input checked="" type="checkbox"/>	Davis	King	E.	Reviewer (Controller)
4551	FY 11-12	U. T. Austin	Change/Correction	<input type="checkbox"/>	Dell'Antonio	Andrew	F.	Reviewer (Controller)
4550	FY 10-11	U. T. Austin	Change/Correction	<input type="checkbox"/>	Musick	Marc	A.	Reviewer (Controller)
4546	FY 11-12	U. T. Austin	Transfer Funds	<input type="checkbox"/>				Signer (Institution)
4543	FY 11-12	U. T. Austin	Transfer Funds	<input type="checkbox"/>				Signer (Institution)
4541	FY 11-12	U. T. Southwestern Medical Center	Change/Correction	<input type="checkbox"/>	Fletcher	Mark		Signer (Institution)
4540	FY 11-12	U. T. Arlington	Transfer Funds	<input type="checkbox"/>				Signer (Institution)
4539	FY 11-12	U. T. Southwestern Medical Center	New Appointment	<input type="checkbox"/>	Leary	Sharon	M.	Signer (Institution)
4538	FY 11-12	U. T. Arlington	Transfer Funds	<input type="checkbox"/>				Signer (Institution)
4536	FY 11-12	U. T. Southwestern Medical Center	Change/Correction	<input checked="" type="checkbox"/>	Dietschy	John	M.	Signer (Institution)
4535	FY 11-12	U. T. Southwestern Medical Center	Change/Correction	<input type="checkbox"/>	Gulledge	Mary	Taylor	Signer (Institution)
4528	FY 11-12	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Signer (Institution)
4527	FY 11-12	U. T. M. D. Anderson Cancer Center	New Appointment	<input type="checkbox"/>	Eby	Anthonia (Toni)	I.	Reviewer (Controller)
4521	FY 11-12	U. T. Health Science Center - Houston	New Appointment	<input type="checkbox"/>	Gregoric, M.D.	Igor	D.	Signer (Institution)
4471	FY 11-12	U. T. El Paso	Change/Correction	<input type="checkbox"/>	Erekson	Keith	A.	Signer (Institution)

 **Tip:** Click on the column title to sort in descending order; click a second time to sort in ascending order!

Create a New RBC:

- Select *Add RBC* from the main menu
- Choose the RBC Type from the drop down
- Click *Continue*



Create a New Appointment or Change/Correction RBC:

- Complete information on the main screen
- Select *Compensation Type* from the drop down. Base Salary should be selected as the first compensation type. Additional compensation types can be added on the next screen.
- After completing all information, select *Next*

New Request for Budget Change - New Appointment

Add New Appointment

Appear on Consent Agenda Yes No

Last Name

First Name

Middle Name

Tenure Yes No

Department

Title

Effective Date

Comments and Source of Funds

Compensation Type

Percent Time

Number of Months

Rate

Note: Additional Compensation Types for this RBC may be added on the next screen.

- To edit general information such as name, title, etc., click *Edit* link located in the lower right corner of the table
- To edit compensation details, click *Edit* link next to the appropriate compensation type
- To add additional compensation types, click the *Add Additional Compensation Info* link

RBC# 4649

RBC#	4649
Change Type	New Appointment
Fiscal Year	FY 14-15
Institution	U. T. Pan American
Appear On Consent Agenda	<input checked="" type="checkbox"/>
Last Name	Clooney
First Name	George
Middle Name	
Tenure	<input checked="" type="checkbox"/>
Effective Date	9/1/2014
Department	College of Arts and Sciences
Title	Professor
Comments and Source of Funds	RBC submitted under budget rule B(c) Source of Funds: Designated

[Add Additional Compensation Info](#) [Edit](#)

New Appointment Compensation Details

Compensation Type	Percent Time	Nbr Months	Rate
Edit Base Salary	100	12	\$750,000.00

- When adding Compensation Types, select applicable type and enter appropriate information in the highlighted fields
- After entering all information, click *Insert* to add or *Cancel* as appropriate

[Add Additional <](#)

New Appointment Compensation Details

Compensation Type	Percent Time	Nbr Months	Rate
Edit Base Salary	100	12	\$750,000.00
Insert Cancel Base Salary	Please enter numbers only!		
Car Allowance			
Max At-Risk Comp			
Non-Cash Comp			
One-time Merit			
Other			
Practice Plan Benefits			
Supplement			
Communication Device Allowance			
Deferred Comp			
Incentive Comp			

Review/Approval Schedule

Approval Date	Approver Role	Routing Comments
	Preparer (Institution)	
	Signer (Institution)	
	Reviewer (Controller)	

Create an Emeritus Award RBC:

- Complete information on screen
- No trailing salary information is required
- Select *Submit*

Add Emeritus Award

Appear on Consent Agenda Yes No

Last Name

First Name

Middle Name

From Department

From Title

Emeritus Title

Effective Date

Item Comments

Create a Transfer of Funds RBC:

- Complete information on screen
- Additional account information can be added on the next screen
- After completing all information, select *Next*

e - Transfer Funds

Transfer of Funds

Appear on Consent Agenda Yes No

Effective Date

Total Transfer Amount


From Account Name

From Amount

To Account Name

To Amount

Item Comments

 Note: To add additional accounts, first complete the above fields and submit. Then select "Add Additional Account Information."

Sign and Route a RBC:

- When RBC is complete, click *Yes* to sign/approve the RBC AND click the button *Route This Item Forward*
- *Hold for Now* is used when the *Yes or No* radio buttons have been selected but the user does not want to route forward until later

The screenshot shows a routing form with a 'Routing Comments' text area at the top. Below it, a red box highlights the 'Sign/Approve RBC?' section, which contains two radio buttons: 'Yes' (selected) and 'No'. To the right of these buttons are two buttons: 'Route This Item Forward' and 'Hold for Now'. At the bottom of the form, there is a 'Go to Top of Page' link.

Search for a RBC:

- Complete known or applicable information
- Select *Get Info*

The search form includes the following fields:

- RBC #:
- Last Name:
- Fiscal Year:
- Institution:
- Change Type:
- Current Status:
- Limit to Consent Agenda Items:

 Below these fields is the text "-- or --" and another checkbox: "List of Consent Agenda Items missing BOR date: ". A red circle highlights the "Get Info" button on the right side of the form.

- Search results are returned
- Note the multiple pages on the search results below

Search Results for All Fiscal Years

1 2 3 4 5 6

RBC#	FY	Institution	Type Change	Consent Agenda	Last Name	First Name	Middle Name	Current Status
2365	FY 07-08	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Final Review (Controller)
2384	FY 07-08	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Final Review (Controller)
2405	FY 07-08	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Final Review (Controller)
2492	FY 07-08	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Final Review (Controller)
2513	FY 07-08	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Final Review (Controller)
2586	FY 07-08	U. T. San Antonio	Transfer Funds	<input checked="" type="checkbox"/>				Final Review (Controller)
2639	FY 07-08	U. T. San Antonio	Transfer Funds	<input type="checkbox"/>				Final Review (Controller)

- Results can be exported to Excel! Look for the link in the top right hand corner of the search results screen

[New Search](#) [Export to Excel](#)



Log Off:

Log off in one of two ways:

1. Click *Logoff* on the Menu Bar
2. Simply close the browser

Request Access:

A list of authorized users is maintained by UT System Office of the Controller. Users will be designated as viewers, preparers, or signers. Viewer access can be used to Consent Agenda preparers. For an individual RBC item, anyone designated as a preparer at that institution can create new RBCs, update RBCs, and route for signature. Anyone designated as a signer can sign an RBC and route it to UT System Administration for further approval. In this manner, the approval process can proceed if one of the designated signers is not available to route the document. Although anyone within the designated group can forward the item, the actual individual who performs the task is the one that is recorded and displayed in the routing history.

Budget Rules:

See the current fiscal year Operating Budget Rules for criteria on RBCs and the criteria for Consent Agenda items. These can be found on the Office of the Controller web page at the following url:

<http://www.utsystem.edu/cont/policies.htm>

Email Notifications:

There are two types of email notifications:

1. Notify when items route to a user
2. Notify when items are final approved

Email notifications have to be set by the Office of the Controller. Requests to add/modify email notifications should be sent to Sherill Franke. See Page 1 for contact information.