https://montevallo.campuslabs.com/planning

Google Chrome is the recommended web browser (other browsers have had minor issues).

Log In (your username & password are the same as your UM Network username & password)

In the upper left you'll see a house icon (Dashboard) and an icon that looks like an org chart (Plans). Click on the org chart icon.

Now, next to those icons you should see a drop-down box for the fiscal years (ex. FY 2021). That is where you select between the fiscal years. Currently, you want to be in FY 2021. I know that can be confusing, because you are asking for additional funds (mid-year funds) for FY20. That is how the system was set up years ago, when the mid-year funding requests were part of the upcoming FY unit planning process. Please let me know if you have questions about that.

Below that fiscal year drop-down box, you should see another drop-down box. This is where you select between Strategic Planning, Unit Planning & Assessment, Student Learning Outcomes (for faculty), and Budget Resources. You may not see all those listed, it depends on the credentials assigned by user (who needs access to what). You'll find Mid-Year Funding Request in the Budget Resources section.

Below the drop-down boxes is where you will select your unit/department. Depending on how many you have responsibility for, several may be visible. Some people may need to first select their division, then their department will appear. I cannot see what you see, so if you have trouble finding your unit/department, please let me know and I'll walk you through it.

Once you are in Budget Resources, in the main portion of the screen you should see three tabs under your unit name. Plan Items, Reports, and Documents.

- The Plan Items tab is where you go to create your Mid-Year Funding Request. Once you've filled in the items in the form, scroll down and click the blue "Done" button at the bottom of the page. That is it, there is not a submit process. Your division head will be able to see what you've entered.

- The Reports tab is where you go to create a pdf (or Word, etc.) of your completed document, if you'd like one. Look for the report named Mid-Year Funding Request, then click on "View Report: 10/1/21 – 9/30/22," then "View Report." Again, I know that is confusing, because you are asking for additional funds (mid-year funds) for FY21. That is how the system was set up years ago, when the mid-year funding requests were part of the upcoming FY unit planning process. We're working on a solution for the future. Please let me know if you have questions about that.

- The Documents tab contains help sheets – miscellaneous planning documents you might find helpful.

Please call (665.6399) or email (jdean5@montevallo.edu) Jerome Dean for help.

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