

July 2018



HOW TO ACCESS YOUR STUDENT ORGANIZATION BANK ACCOUNT



STUDENT ORGANIZATION BANK ACCOUNTS

- Set up through the University Accounting Office
- Used for handling all monetary transactions including; depositing funds from fundraisers and other events, collecting dues, paying expenses and sending donations to charitable organizations
- Funds deposited into your account carry over from year to year
- *Student Organizations are not permitted to use the NEOMED Federal or State I.D. numbers to obtain bank accounts outside of the University*



ACCESSING YOUR BUDGET INDEX REPORT

- As authorized signers, Treasurers (Presidents and VPs) have access to Banner Self Service to view their student organization index account.
- **Go to NEOMED Homepage/click on STUDENTS/ Academic Tools & Support/Banner Self Service (the same way you access your grades)/Finance Menu/ Budget Queries**
- To access your organization index account, follow the directions on the next slide

THE PULSE

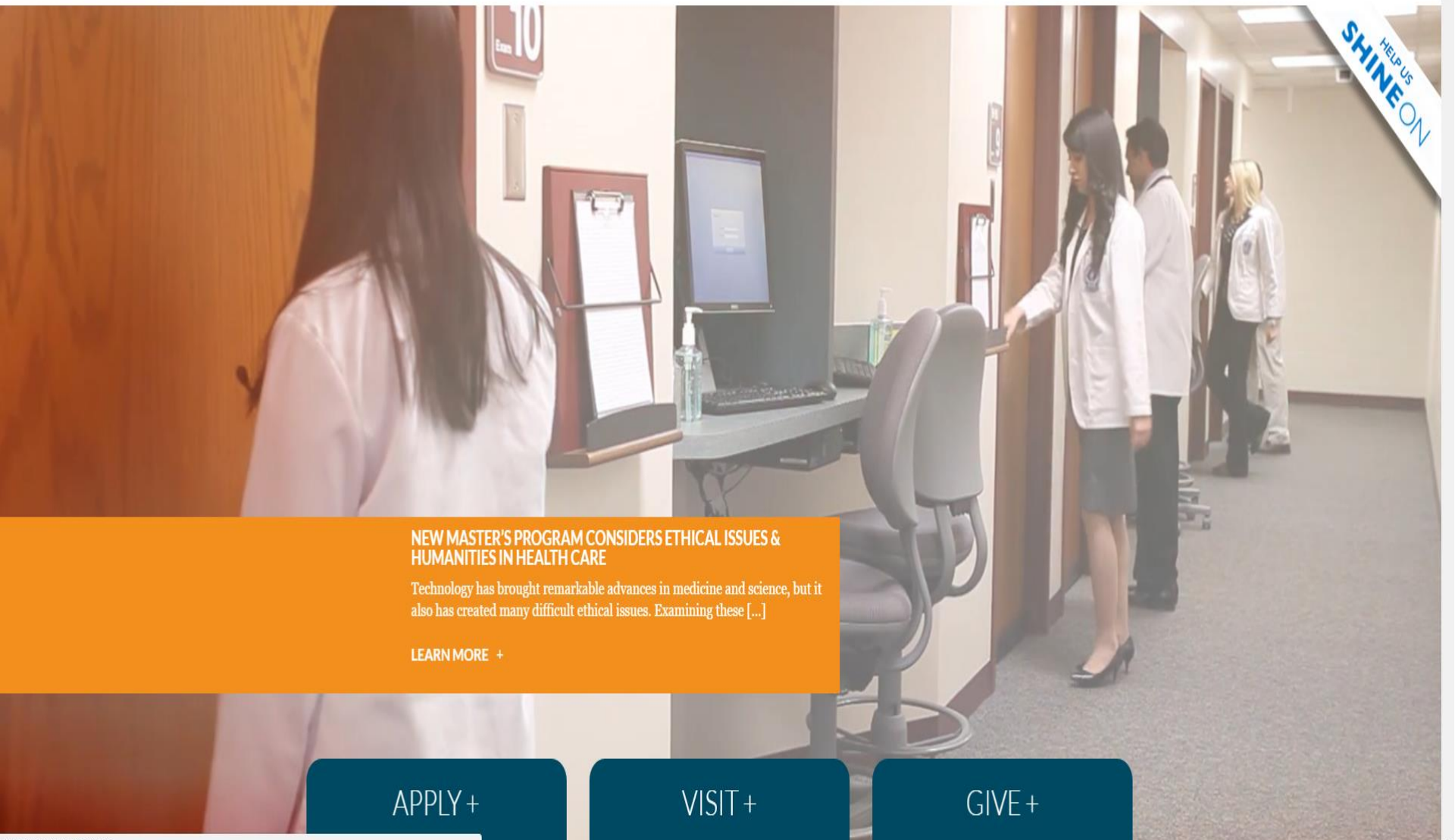
For: [STUDENTS](#) [FACULTY & STAFF](#) [ALUMNI](#)

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FOR STUDENTS

STUDENT RESOURCES

Designed to provide NEOMED students with quick, easy access to your most-used links.

- Academic Tools & Support

- [AIMS](#)
- [Banner Self Service](#)
- [Career Center](#)
- [Email](#)
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- [Learning Center](#)
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+ News & Events

- + [Campus Amenities](#)
- + [Campus Resources](#)
- + [Get Involved](#)



ACCESSING YOUR BUDGET INDEX REPORT

- Create a New Query Type: Budget Status by Organization Hierarchy, then create query
- Check boxes: Adjusted budget, Year to Date, Available Balance, then hit continue
- Make sure Fiscal year is the current academic year end, example: July 1 2016 – June 30, 2017 = 2017 (this will change for next year to 2018)
- Always put in 14 in the fiscal period to give you everything as of today
- Comparison Fiscal year: None
- Comparison Fiscal Period: None
- Commitment Type: All
- Chart of accounts: C
- Make sure all other fields are blank
- Go back and fill in index with correct index number
- Check Include Revenue Accounts
- Submit Query. This will cause the fund, org and program fields to populate. Hit submit query again.
- Because revenue is included, (revenue is a negative in accounting world) if you have a negative, then the index really has a positive balance on the index summary page only. The amount in the available balance column should be the balance left in the index.
- You can get more detail by clicking on any field that is underlined.
- You can also call the accounting office at 330-325-6373 for help in getting your balances.

Browse

Find a page...

Home > Finance

- Personal Information
- Alumni and Friends
- Faculty Services
- Employee
- Finance**
- College Directory
- Student Pictures



Budget Queries	Encumbrance Query	Approve Documents	View Document
Budget Development	Labor Distribution	Position Budget Control	

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RELEASE: 8.7

Last web access on 03/30/2017 at 11:02 am | [SITE MAP](#)

Create a New Query Type: Budget Status by Organization Hierarchy, then create query

The screenshot shows a web browser window with the URL https://ssbps1.neomed.edu/neou/bwfkpvu.P_Budget_Start. The page header includes the Northeast Ohio Medical University logo and navigation links for 'Sign Out' and 'Help'. A breadcrumb trail shows 'Home > Finance > Budget Queries'. The main content area contains a message: 'To create a new query choose a query type and select Create Query. To retrieve an existing query choose a saved query and select Retrieve Query.' Below this, there are two sections: 'Create a New Query' and 'Retrieve Existing Query'. In the 'Create a New Query' section, the 'Type' dropdown is set to 'Budget Status by Organizational Hierarchy' and the 'Create Query' button is highlighted with a large black arrow. In the 'Retrieve Existing Query' section, the 'Saved Query' dropdown is set to 'None' and the 'Retrieve Query' button is visible. A horizontal menu at the bottom of the content area lists various query types: Budget Queries, Encumbrance Query, Approve Documents, View Document, Budget Development, Labor Distribution, and Position Budget Control. The footer includes the copyright notice '© 2017 Ellucian Company L.P. and its affiliates.', the version 'RELEASE: 8.7.0.2', and a 'SITE MAP' link.

Check boxes: Select all boxes, then hit continue

Secure | https://ssbssl.neomed.edu/neou/bwfrpvu.P_Budget_Start

Apps | AAMC Account | Login | ShareFile Login | http://tor.mywellsite.c | Payment Completed | NEOMED App Launch | Dashboard | Check In | My Profile - Zoom | Work Order

Northeast Ohio MEDICAL UNIVERSITY

Sign Out | Help

Browse

Personal Information | Alumni and Friends | Faculty Services | Employee | Finance | College Directory | Student Pictures

Find a page...

Home > Finance > Budget Queries

Select the Operating Ledger Data columns to display on the report.

<input checked="" type="checkbox"/> Adopted Budget	<input checked="" type="checkbox"/> Year to Date
<input checked="" type="checkbox"/> Budget Adjustment	<input checked="" type="checkbox"/> Encumbrances
<input checked="" type="checkbox"/> Adjusted Budget	<input checked="" type="checkbox"/> Reservations
<input checked="" type="checkbox"/> Temporary Budget	<input checked="" type="checkbox"/> Commitments
<input checked="" type="checkbox"/> Accounted Budget	<input checked="" type="checkbox"/> Available Balance

Save Query as:

Shared

Continue

Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Development | Labor Distribution | Position Budget Control

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SITE MAP

Accessing Your Budget Index Report: Type in your student organization index number (ex. 55049)

For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Organization or Grant fields as well as the Fiscal Year, Period, and Chart of Accounts fields. If Grant information is queried, all retrieved information is Grant Inception to Date. Otherwise, all information retrieved is through the Fiscal Year to Date.

To perform a comparison query select a Comparison Fiscal Year and Period in addition to the required Fiscal Year and Period. With this selection, all details retrieved will be placed next to the corresponding comparison fiscal period.

Fiscal year: 2017 **Fiscal period:** 14
Comparison Fiscal year: None **Comparison Fiscal period:** None

Commitment Type: All

Chart of Accounts: C **Index:** 55049

Fund: **Activity:**

Organization: **Location:**

Grant: **Fund Type:**

Account: **Account Type:**

Program:

Include Revenue Accounts

Save Query as:

Shared

Submit Query

Budget Queries ■ Encumbrance Query ■ Approve Documents ■ View Document ■ Budget Development ■ Labor Distribution ■ Position Budget Control

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SITE MAP

NEOMED

For the 2018-19 year, **type in 2019** for “Fiscal Year” after July 1st

Accessing Your Budget Index Report

Secure | https://ssbpsi.neomed.edu/neou/bwfkprvu_P_Budget_Start

Apps | AAMC Account | Login | ShareFile Login | http://tor.mywellsite... | Payment Completed | NEOMED App Launch | Dashboard | Check In | My Profile - Zoom | Work Order

Northeast Ohio MEDICAL UNIVERSITY | Sign Out | Help

Browse

Personal Information | Alumni and Friends | Faculty Services | Employee | Finance | College Directory | Student Pictures

Find a page...

Home > Finance > Budget Queries > Report A

Select a link from an amount column in the Query Results list to retrieve detail information for the specific item chosen. Select one of the Download options to download Budget Query data to a Microsoft Excel spreadsheet. Calculate user defined columns for the query by making selections from the Compute Additional Columns pull down lists.

Use the View Pending Documents button to display unposted documents in process that are excluded from the Budget Status Report. Also select the View Pending Documents button to view a summary of the available balances used for non-sufficient funds (NSF) checking.

Report Parameters

Organization Budget Status Report			
By Organization			
Period Ending 06/30/2017			
As of 03/30/2017			
Chart of Accounts	C Northeast Ohio Medical University	Commitment Type	All
Fund	55049 AMSA-American Medical Student Assoc	Program	XXXX Undistributed
Organization	55049 AMSA-American Medical Student Assoc	Activity	All
Account	All	Location	All

View Pending Documents

✓ No pending documents exist

Query Results

Organization	Organization Title	FY17/PD14 Adopted Budget	FY17/PD14 Budget Adjustment	FY17/PD14 Adjusted Budget	FY17/PD14 Temporary Budget	FY17/PD14 Accounted Budget	FY17/PD14 Year to Date	FY17/PD14 Encumbrances	FY17/PD14 Reservations	FY17/PD14 Commitments	FY17/PD14 Available Balance
55049	AMSA-American Medical Student Assoc	(6,042.88)	0.00	(6,042.88)	0.00	(6,042.88)	3,829.98	0.00	0.00	0.00	(9,872.86)
55049	Rollup	(6,042.88)	0.00	(6,042.88)	0.00	(6,042.88)	3,829.98	0.00	0.00	0.00	

Download All Ledger Columns | Download Selected Ledger Columns

Save Query as:

Shared

Compute Additional Columns for the query

Column 1	Operator	Column 2	Display After Column	New Column Description
FY17/PD14 Adopted Budget	percent of	FY17/PD14 Adopted Budget	FY17/PD14 Adopted Budget	<input type="text"/>

Perform Computation

Another Query

NEOMED