

SECTION 3.11 – BUDGET CHANGE PROCESS

Contact: Budget @ 4154 (Karen)/4155 (Linda)/4156 (Tina)

A. **Overview**

Budgets are built with information provided during the budget development process. Because plans change, it is sometimes necessary to revise your budget.

B. **Manual Process**

To make changes, e-mail your request to the budget office. Your request should include the following information:

- ✓ The Fully Qualified Account (FQA), object code and dollar amount to be moved from
- ✓ The FQA, object code and dollar amount to be moved to
- ✓ The dollar amounts being moved from and to must be equal amounts

Example

Move \$10,000 **from** 10-01-27-225-081000 – 55610

Move \$ 5,000 **from** 10-01-27-225-081000 – 57340

Move \$15,000 **to** 10-01-24-225-081000 – 55610

If you have several budgets to modify, you can use an Excel spreadsheet and send to the budget office. When the budget office receives your request, they will:

- Verify the FQA and object code have budget capacity to move the dollars requested
- Enter the proposed change into BusinessPlus and forward for authorization as required by [Policy 6000P](#). Once authorized, the change will post to BusinessPlus
- Advise the originator that the change has occurred

C. **Electronic Process**

As an alternative, the BusinessPlus financial system provides an electronic method for processing budget change requests.

- Verify the FQA and object code have budget capacity to move the dollars requested
- Log on to BusinessPlus and select the Home tab
- *First time using web forms:* Next to Home, select “Change Content”; check ESD Web Forms under School or Department Content; save and return to home page.
- At Home page, select Budget Transfer Request under ESD Web Forms section

Electronic Process, Continued

- In the web form, items with an asterisk are required
 - ✓ Fiscal Year: 2020 = 2019-20 fiscal year
 - ✓ Budget Version: CB - Current ONLY
 - ✓ Transaction Type: A - Adjustment to Existing Budget
 - ✓ Description
 - ✓ Transfer From Account
 - ✓ Transfer To Account
 - ✓ Amount
- Items without an asterisk are not required
- Following is a sample budget transfer:

BusinessPLUS

a PLUS 360 Application

Budget Transfer Request - Add Mode

MONTGOMERY, DEBORAH J | ? Help

Requestor: 09473

Connection: ifas

Batch Information

Fiscal Year*: 2020

Budget Version*: CB-CURRENT

Reason:

Comments: From Basic Ed Teaching to Guidance Counseling

Level: OB

Transaction Type*: A - Adjustment to Existing Budget

Fund Type:

Description*	Transfer From Account*								Transfer To Account*								Amount*
Basic Ed Tch to G Counseling	GL	10	01	27	225	081000	55610		GL	10	01	24	225	081000	55610	10,000.00	
Basic Ed Tch to G Counseling	GL	10	01	27	225	081000	57340		GL	10	01	24	225	081000	55610	5,000.00	
	GL								GL								
	GL								GL								
	GL								GL								
	GL								GL								
	Transfer Total:															15,000.00	

Request Status:

Submit

Attach

Reset

- Review your work, attach backup if desired, and select Submit
- Alert the budget supervisor that they will receive a Workflow email to approve
- After budget supervisor approval, the budget office reviews and approves
- A system email is sent to originator after the change has occurred