

SECTION 3.11 – BUDGET CHANGE PROCESS

Contact: Budget @ Extension 4154/4157

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 org key, object code and dollar amount to be moved from
- ✓ The org key, 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** 0127250000 – 5001

Move \$ 5,000 **from** 0127250000 – 7001

Move \$15,000 **to** 0124250000 – 5001

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 org key 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 org key 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: 2017 = 2016-17 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

FLOYD, RUTH E | ? Help

Requestor: 10893
Connection: ifas

Batch Information

Fiscal Year*: 2017
Level: OB

Budget Version*: CB-CURRENT
Transaction Type*: A - Adjustment to Existing Budget

Reason:
Fund Type:

Comments: Balance region budgets

Description*	Transfer From Account*	Transfer To Account*	Amount*
North region to South region	GL 0121718264 5001	GL 0121718164 5001	2,000.00
North region to Central region	GL 0121718264 5001	GL 0121718364 5001	2,000.00
	GL	GL	
	GL	GL	
	GL	GL	
Transfer Total:			4,000.00

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