

Stay tuned....

This section will be updated soon with new FQA information. If you have questions regarding the new account code structure, please contact William (X4155) or Ruth (X4157) in the Budget Department.

Thank you!

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 <u>Policy 6000P</u>. Once authorized, the change will post to BusinessPlus
- Advise the originator that the change has occurred

C. <u>Electronic Process</u>

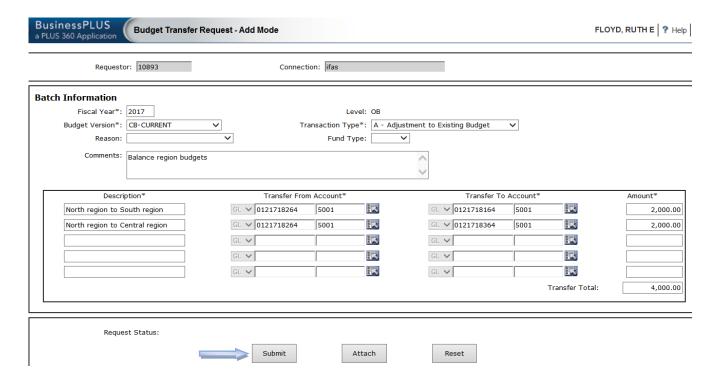
As an alternative, the BusinessPlus financial system provides an electronic method for processing budget change requests.

- 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

Rev. 07/16 Section 3.11 Page 1 of 2

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:



- · 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

Rev. 07/16 Section 3.11 Page 2 of 2