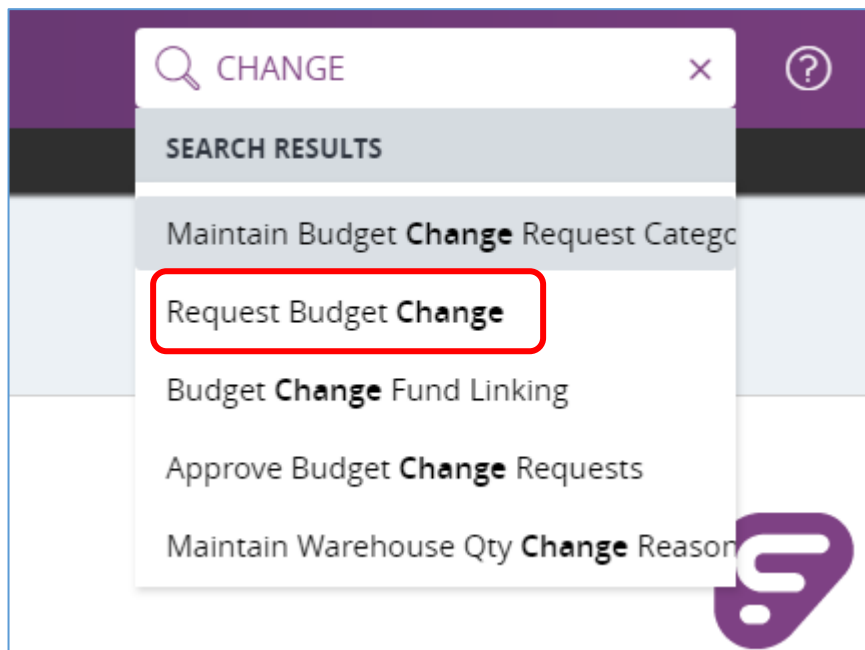# BUDGET CHANGE REQUEST INSTRUCTIONS

(previously Budget Amendment)

Use the Request Budget Change function to submit a request to move funds from one General Ledger account to another. The accounts to which you have access are associated with your position. Requests you submit may be approved or denied either through the Budget Change Request workflow or automatically based on district-defined rules governing budget transfers.

In the search box in the upper right hand side of your screen type in the word "CHANGE". Select "Request Budget Change" or choose it from your Dashboard menu.

Click "ADD" to start a new Budget Change Request (BCR)

For these instructions only we are using year 2021. You will use the appropriate school year
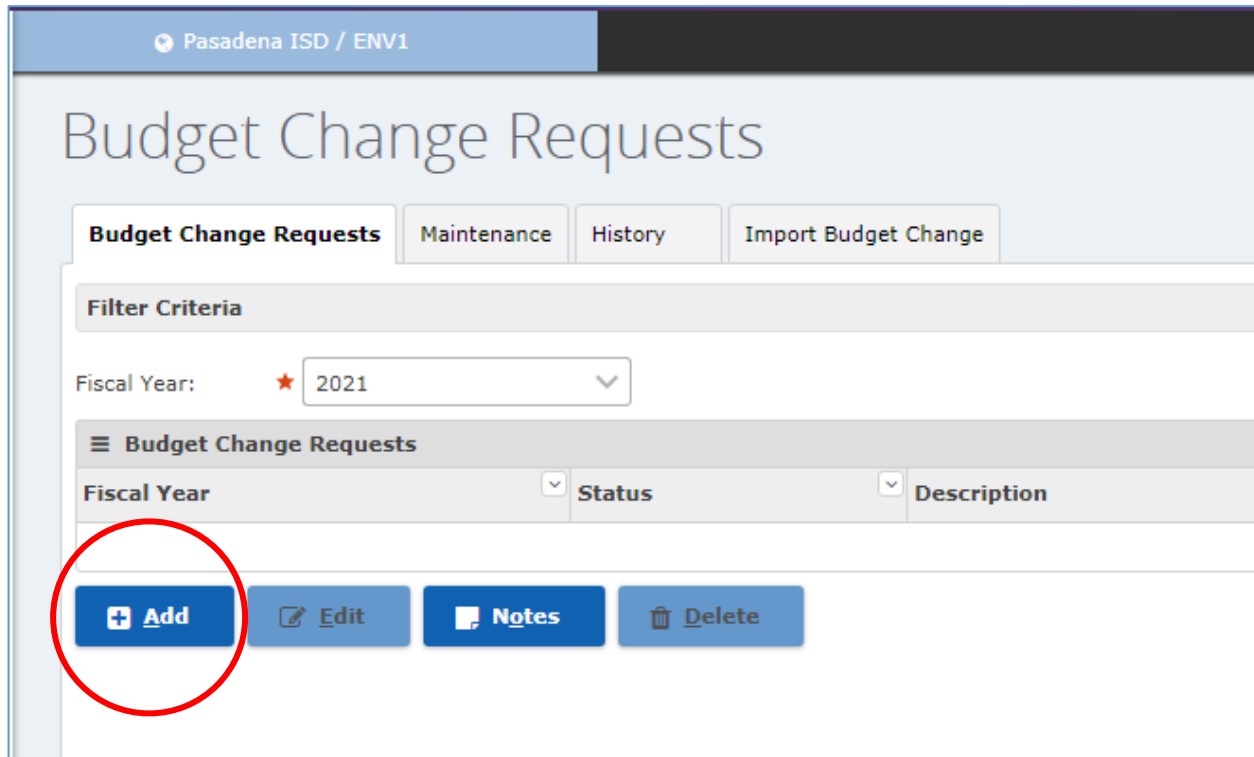
The date will self populate.

Add a short description in the "Description" box.

If you are moving funds between Functions please add the description "==REALLOCATE TO PROPER FUNCTIONS=="

Enter the reason for the change request in the "Justification" box

DATE DEVELOPED: 08/03/21	REVISED DATE:
SUBJECT: **Request Budget Change**	

Click on the plus sign under **Decrease Accounts**. The account string will appear as boxes to be filled in with the account you want to Decrease.

Once you fill in the account code to Decrease, it will show your current balance in that account.

The wording above the boxes will turn green when entering your account.

If at any time you put incorrect information or the account code is not set up the wording above the boxes will turn red. Please reach out to the Budget Dept. if you need an account setup.

Fill in the dollar amount you want to Decrease in whole dollars only, then hit tab. Once you do this the amount will show up above the box and in RED next to the percentage amount. If you want to take from multiple accounts click the ⊞ icon to add another line.

Click on the plus sign under Increase Accounts. The account string will appear as boxes to be filled in with the account you want to Increase.

Once you fill in your account code to Increase, it will show your current balance in that account.

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The wording above the boxes will turn green when entering your account.

If at any time you put incorrect information or the account code is not set up the wording above the boxes will turn red. Please reach out to the Budget Dept. if you need an account setup.

Fill in the dollar amount you want to Increase in whole dollars only, then hit tab. Once you do this the amount will show up above the box and in RED next to the percentage amount. If you want to move to multiple accounts click the [+] icon to add another line.

After reviewing the information you have entered, click "Submit" if it is ready to be processed. Once you click "Submit" you cannot make any changes.

If you are not ready to submit for approval then click "Save". You will then be able to edit before submitting it for approval.

Once you click "Save" it will take you to the main screen where it lists your pending Budget Change Requests.

If you need to make changes locate your Budget Change Request on the main screen. Click on it and it will highlight in yellow. Once it is highlighted in yellow click on "Edit" to open.

Once you open your Budget Change Request you can edit the Description, Notes, Account codes or Dollar amount.

Maintain Budget Change Request

Fiscal Year: 2021   Request Description: REALLOCATE BUDGET

Budget Change Requests	**Maintenance**	History	Import Budget Change

Budget Change Request Details

Request ID: 17

Date: ★ 08-03-2021

Description: ★ REALLOCATE BUDGET

Justification: ★ ✏️ ADMIN TRAVEL

    Characters remaining: 488   (500 max)

Decrease Accounts

Account	Balance	Amount	Percentage	
199.23.6399.000.001.99.000000.2021.001	$20,000.00	$1,000.00	100.0000%	🗑
➕		$1,000.00	100.0000%	

Auto Complete: on

Increase Accounts

Account	Balance	Amount	Percentage	
199.23.6411.000.001.99.000000.2021.001	$20,000.00	$1,000.00	100.0000%	🗑
➕		$1,000.00	100.0000%	

Auto Complete: on

If you need to change the account code information click on the account string and the boxes will appear.

Make your changes making sure to fill in the dollar amount again as whole dollars.

Once you are done editing and have reviewed it for errors click on "Submit".

Once you click "Submit" you cannot make any changes.

DATE DEVELOPED: 08/03/21	REVISED DATE:

SUBJECT: **Request Budget Change**

Once you click "Submit" it takes you back to the main screen and will give you a message that it was saved successfully and that the Approval is in Progress

Note: If you have previously entered a budget change request and its status is "Approval in Progress", it is displayed on the tab. To search for a previous budget change request that has already been approved or denied, use the History tab.

How to Delete a Budget Change Request

If you need to delete your BCR locate it on the main screen. Click on it and it will highlight in yellow. Once it is highlighted in yellow click on "Delete".

How to view previously submitted budget change request

Click the History tab to bring it forward.

You can filter your search by Fiscal Year, Status, Date or Trans #

Once you enter your search criteria click on the "Search" button. Your BCR's will appear at the bottom.
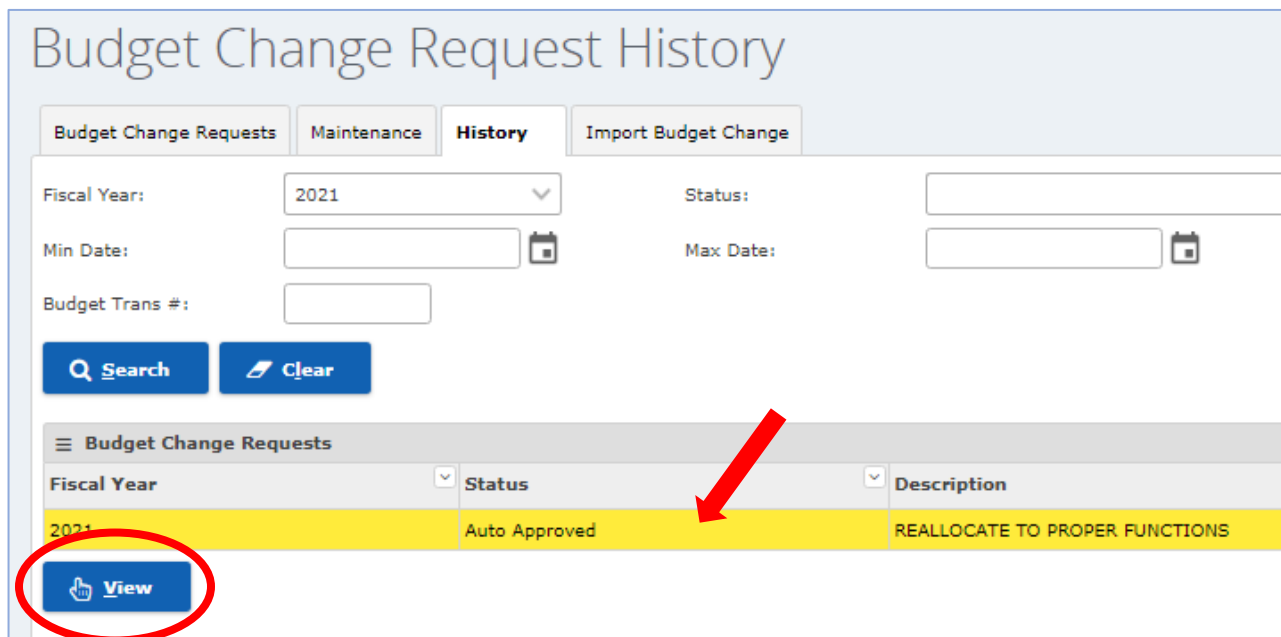
Click on the BCR you want to view and it will highlight in yellow. Once highlighted click on "View"

Budget Approvals

- Fund 199 - Same Function and PIC
  - This will not come to the budget office
  - Once BCR is approved it will post

- Fund 199 - Between Function and PIC
  - This will come to the budget office
  - Once reviewed and approved it will post

- Fund 461
  - The budget office will set up budgets in account 6399 using the corresponding student activity group
  - Example: 461-23-6399-000-001-00-00PRIN
  - You will then be able to move these around as needed with only your Principals approval

- Grant Funds
  - BCR for grant funds will still flow the same as before