

Create Budget Amendment as Cost Center Budget Specialist

From the *search* bar:

1. Enter **Create Budget Amendment for Organization**. Search and click on **Create Budget Amendment for Organization – Task**.

Create Budget Amendment for Organization

Important Reminder:

- Select Amendment Types appropriate for your plan structure, e.g. Award Plans should use amendment types supported by the entry type of Award
- Select any detail worktag first in the budget line since related worktags may default
- If the plan is budgeted at a hierarchy level, you should select the hierarchy and override any related worktag that may have defaulted in, e.g. budgeting by fund hierarchy you need to remove the fund worktag if it defaulted in

Organization

Budget Structure

Company

Budget Name

Populate Existing Budget Lines

Ledger Account/Summary

Worktags

Budget Period

2. The **Create Budget Amendment for Organization** page displays.
3. Complete the **Organization**, **Budget Structure**, **Company**, and **Budget Name** fields.
4. If required, complete the **Populate Existing Budget Lines** section.

Note:

Populate Existing Budget Lines

Ledger Account/Summary 4300:Sales & Services of Educational Departments

Ledger Account/Summary 6000:General Operations - Budget Only

Worktags Program: PG01994 Unr Band Activities

Budget Period

Optional: Under Populate Existing Budget Lines, enter your ledger account or worktags if you have specific lines you are updating to list the current budget lines as a starting point. If you do not enter a worktag(s), then you get blank lines to enter your changes.

5. Click **OK** to continue to next page.

Company University of Nevada, Reno

Budget Structure Fiscal Year - Child

Budget Name UNR 2018 Fiscal Year Budgets - child

Years FY 2018 - July - June

Currency USD

Budget Start Date 07/01/2017

Budget UNR 2018 Fiscal Year Budgets - child

Organizing Dimension Type (empty)

Amendment Date * 04 / 03 / 2018

Description * Cost Center Budget Spec (Sample)

Amendment Type * X Transfers

Entry Type Temporary Reallocation

Balanced Amendment

Enter changes to original Budget data.

Budget Amendment Lines | Attachments

Submit Save for Later Cancel

6. On top of entry screen, select your **Amendment Date** (Defaults to current date).
7. Enter a **Description**.
8. Select an **Amendment Type**.

Note: The **Entry Type** and **Balanced Amendment** check box will populate automatically after the **Amendment Type** is entered.

9. On the bottom of the entry screen enter the Budget Changes. The lines you requested are populated with current budget, balance, and input areas.

10. If you are entering new lines, the Period has only one selection based on the Budget Structure chosen. Your Ledger Account and Worktags will need to be entered in full.
11. The current budget, current spend, and remaining budget columns will populate. You can enter a change as a % or as a \$ and the resulting budget will calculate. The memo field can be updated with additional information about the amendment as shown below. You can also add and delete new lines as needed.

Note: Your budget change must balance in most cases.

If you change a populated line and then zero the change, you will need to delete the line to avoid an error.

12. When you have completed all entries, click **Submit**.
 13. If your role is **Cost Center Budget Specialist**, the amendment is routed to the **Unit Manager** for approval and then to your central budget staff roles (**Budget Specialist** or **Budget Manager**) for approval.
 14. The **Budget Manager** and Budget Specialist can modify a budget amendment submitted from a Cost Center Budget Specialist upon approval.
 15. If the budget type is an **Award**, the amendment will route to the Grant Accountant.
 16. To add additional approvers such as the Cost Center Manager, click on **Add Approvers**. A window will open giving you the option to select the additional approver.
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