

# BUDGET CHANGE REQUESTS

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A budget change increases or decreases the budget (spending limit) for a given account. A budget change will only affect the amounts in the "budget" column on the reports in Business Plus. Budget changes do not affect amounts in the expenditure column. If you need to move an expense/purchase from one account to another, you will need to submit a **journal entry** instead of a **budget change**.

Budget changes should be recorded before your school or department exceeds its budget. If you wait to submit a budget change until after the budget limit has already been exceeded, the system may prevent you from submitting a budget change request web form. If this happens, contact the business department for assistance.

Budget changes must balance, meaning the total budget increases must be completely offset by equivalent budget decreases.

Budget changes should only be used for district accounts (accounts where the district provides funding to your school or department). Budget changes should not be used for school accounts (accounts which are funded by student fees, fundraisers, donations, gate receipts, etc.)

Budget changes may be subject to certain restrictions or prohibitions based on the nature of the accounts affected. For more information on this, refer to the document titled "District Ledger Accounts" on the Business Department's website.

## Step-by-step instructions

- Find the "Web Forms" area in Business Plus and select "Budget Change Request."

The screenshot shows the 'Finance' section of the Business Plus dashboard. At the top, there are navigation tabs for 'Purchasing' and 'Finance'. Below this, there is a 'Go to Jobs Archive' section with a table that currently shows 'No items to display'. To the left, there is a 'Go to Workflow Tasklist' section showing 'No tasks'. In the bottom left, the 'Webforms' section lists three items: 'Budget Change Request', 'New Vendor Request', and 'Travel Reimbursement'. A red star is drawn over the 'Budget Change Request' link. To the right, the 'Common Finance Reports' section lists several reports, including 'WCSD\_GL8004\_PRINCIPALS\_REPORT', 'WCSD\_GL8010: PROGRAM\_BY\_OBJECT', 'WCSD\_GL8009: EXPENDITURE\_DETAIL', 'WCSD\_PO8000: Purchase Order Status Inquiry', 'WCSD\_GL8016: Simplified Budget report', and 'WCSD\_GL8018: Program Balance report'.

- Make sure the correct fiscal year is specified. *(In Business Plus, the 2021-2022 fiscal year is shown as 2022.)*
- Select **AJ - Adjusted Budget** as the budget version.
- Select **RB - Rebudgets** as the reason.
- Select **A - Adjustment to Existing Budget** as the transaction type.
- Select **RB - Rebudget** as the fund type.
- Enter a brief explanation for the budget change in the comments section. *(This where you can explain or justify the budget change to whoever will be approving the budget change in the workflow process.)*
- Enter a description. *(This should be a reminder to help you remember why the budget change was recorded. This shows up as a permanent record in Business Plus. You only have a limited number of characters to work with, so keep it brief.)*
- Specify the “transfer from” account and the “transfer to” account, and the amount you are requesting to transfer.
- You may use a single budget change request to move funds between many accounts. Use the “Add” button to add as many rows as you need. Once you have finished entering all required information, your screen should look something like this:

Requestor:  Connection:

**Batch Information**

Fiscal Year\*:  Level: OB

Budget Version\*:  Transaction Type\*:

Reason:  Fund Type:

Comments:

Description*	Transfer From Account*	Transfer To Account*	Amount*
<input type="text" value="Transfer to instr. supplies"/>	GL <input type="text" value="1185261102"/> <input type="text" value="690"/>	GL <input type="text" value="0050100102"/> <input type="text" value="610"/>	<input type="text" value="500.00"/>
<input type="text" value="Transfer to instr. supplies"/>	GL <input type="text" value="1185262102"/> <input type="text" value="680"/>	GL <input type="text" value="0050100102"/> <input type="text" value="610"/>	<input type="text" value="250.00"/>
<input type="text"/>	GL <input type="text"/>	GL <input type="text"/>	<input type="text"/>
<input type="text"/>	GL <input type="text"/>	GL <input type="text"/>	<input type="text"/>
<input type="text"/>	GL <input type="text"/>	GL <input type="text"/>	<input type="text"/>
Transfer Total:			<input type="text" value="750.00"/>

Request Status:

- The system does allow you to attach a document to the budget change, but in almost all cases the explanation in the comments area will be sufficient and no attachments will be necessary.
- Click on the “Submit” button. When you do this, a green message will momentarily appear in the upper right corner, letting you know the request was successfully submitted.

Once it has been submitted, the budget change request will go through a workflow approval process, beginning with your principal or department head. From there the request will be forwarded to other administrators, depending on which accounts the budget change is impacting. The business department is the final stop in the workflow approval process. The workflow approval may happen quickly, or it may take several days, depending on how attentive people are to their workflow tasks.