

Budget Amendments for Sponsored Projects

This process is initiated when there is a need to move dollar amounts within the same grant budget for re-budgeting purposes. Please note that this is only allowable for F20 and F16 (Cost Share) within the same grant.

Like all workday transactions, please allow for 24-48 hours for review and approvals of transactions. We will not accept email requests or SNOW tickets requesting these transfers moving forward, they have to all be initiated using Workday. Please read and follow the guidance below since the procedure for this amendment is different from other budget amendments.

The final determination for approval, based on allowability and allocability, lies with the Grants Accounting team.

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This guide illustrates the steps for budget transfer requests for **Award** budgets. In all situations, this will be between *Ledger Account Summaries* - defined as Re-Budget - and completed directly in Workday. It applies to the Award Budget structure and is only for the following funds: **F20** Sponsored Awards Fund and **F16** Grants Cost Sharing Fund.

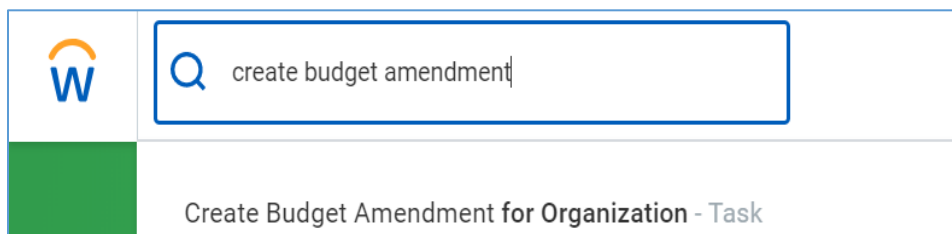
Budget Amendment Rules

The system will return a hard stop error if the following rules have not been followed:

- 1) If any other Amendment Type, other than Re-Budget is used. This is amendment is only for re-budget of **Non-Personnel** budget ledger summaries.
- 2) The budget transfer should **not** be used to transfer BETWEEN grants.
- 3) Budget transfers should always be for the **Award Performance Period**.
- 4) You cannot affect the subaward and participant costs line.
- 5) You must not submit any transaction without attachments and justification for the transfers.

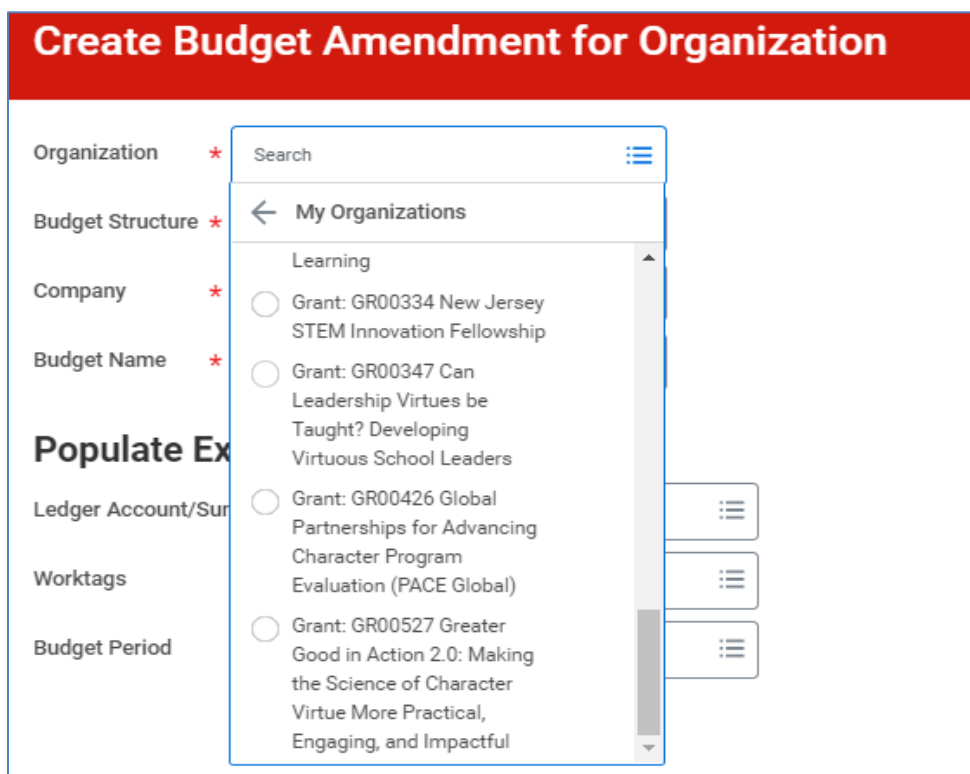
Entering a Budget Amendment

- 1) In the *Search* field, enter **Create Budget Amendment for Organization – Task**.



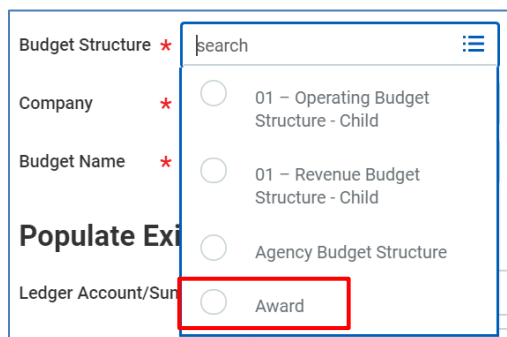
The screenshot shows a search bar with a magnifying glass icon and the text "create budget amendment". Below the search bar, a dropdown menu is open, displaying the text "Create Budget Amendment for Organization - Task".

- 2) In the **Organization** field, select the **Prompt** icon and **My Organizations** to view a list of those Cost Centers and Grants associated and available to you.



The screenshot shows the "Create Budget Amendment for Organization" form. The "Organization" field is selected, and a dropdown menu is open showing "My Organizations". The dropdown menu lists several grants, including "Grant: GR00334 New Jersey STEM Innovation Fellowship", "Grant: GR00347 Can Leadership Virtues be Taught? Developing Virtuous School Leaders", "Grant: GR00426 Global Partnerships for Advancing Character Program Evaluation (PACE Global)", and "Grant: GR00527 Greater Good in Action 2.0: Making the Science of Character Virtue More Practical, Engaging, and Impactful".

- 3) Continue completing the following fields:
 - **Budget Structure** – Click the **Prompt** icon and select Award



The screenshot shows the "Budget Structure" dropdown menu. The dropdown menu is open, showing several options: "01 – Operating Budget Structure - Child", "01 – Revenue Budget Structure - Child", "Agency Budget Structure", and "Award". The "Award" option is highlighted with a red box.

- **Company** – Click the **Prompt** icon and select Montclair State University.

Company *

Budget Name * ☐ Montclair State University

- **Budget Name** - Click the **Prompt** icon and select the appropriate Award from the list for the grant selected above.

Budget Name *

Populate Existing Budget Lines

Ledger Account/Summary

Worktags

Budget Period

- ☐ AWD-00000003: Changes in Shrub Abundance in Arctic Tundra From T 09/01/2015 (version 0)
- ☐ AWD-00000004: Collaborative Research: Integ 08/15/2015 (version 0)
- ☐ AWD-00000005: Partners for Health-Montclair Community Farms 10/15/2015 (version 0)
- ☐ AWD-00000006: Woodrow Wilson Teaching Fellowship Induction progr 01/01/2016 (version 0)
- ☐ AWD-00000007: CAREER: Geographic Suitability, Socioeconomic Unc 08/01/2016 (version 0)
- ☐ AWD-00000008: Collaborative

- 4) In the **Populate Existing Budget Lines** section, (Optional) complete the following in order to filter the fields of the budget amendment screen:
 - **Ledger Account/Summary** - Click the **Prompt** icon and select from the list of Ledger Account Summaries from which, and to which you are requesting budget transfer. If you do not know the ledger account summaries, leave this field blank. All ledger account summaries will show on the next screen.
 - **Worktags** – Click the **Prompt** icon, select **Grant ID** or leave blank, and the grant indicated in the header will be available on the next page.
 - **Budget Period** – Always select the **Award Performance Period** or leave blank.

Populate Existing Budget Lines

Ledger Account/Summary

Worktags

Budget Period

- 5) Click **OK**.
- 6) Complete the following fields on the **Create Budget Amendment for Organization** screen:
 - **Amendment Date:** Defaults as the current date.
 - **Description:** Provide a description which clearly indicates the reason for this request:

← Create Budget Amendment for Organization

Company

Montclair State University

Budget Structure

01 – Operating Budget Structure - Child

Budget Name

FY20 Operating Budget

Years

FY 2020 - Fiscal Schedule

Currency

USD

Budget Start Date

07/01/2019

Budget

FY20 Operating Budget

Organizing Dimension Type

(empty)

Amendment Date

*

09 / 13 / 2019

Description

*

Amendment Type

*

Entry Type

(empty)

Balanced Amendment

☒

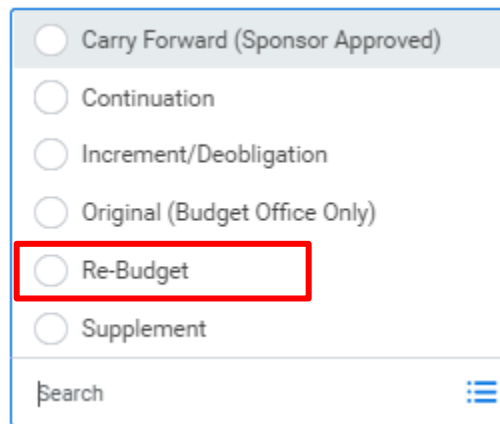
Enter changes to original Budget data.

Submit

Save for Later

Cancel

- **Amendment Type:** Select **Re-Budget** – if any other amendment type is selected it will create an error.



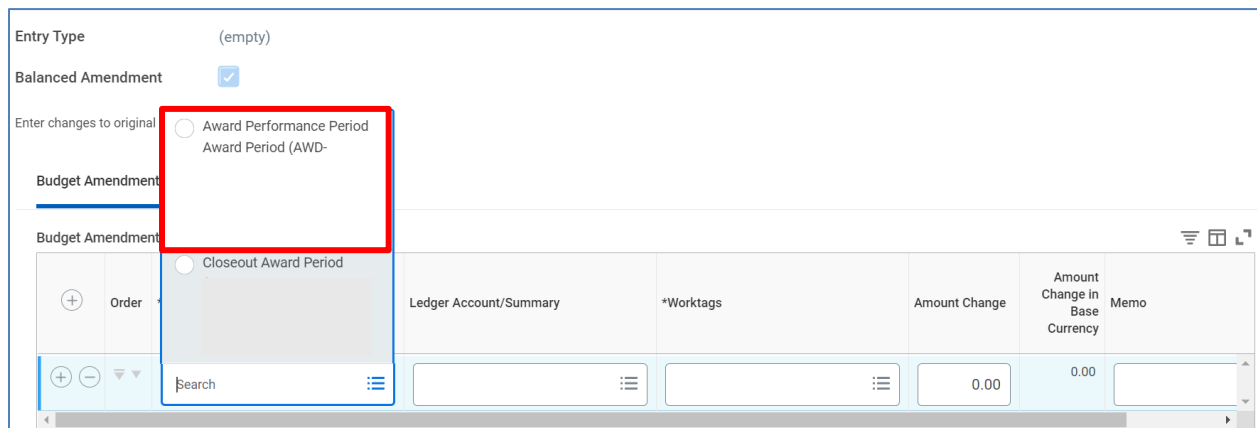
☐ Carry Forward (Sponsor Approved)
☐ Continuation
☐ Increment/Deobligation
☐ Original (Budget Office Only)
☐ **Re-Budget**
☐ Supplement

Search

7) Scroll down to **Budget Amendment Lines**.

8) If fields were selected in the **Populate Existing Budget Lines** section (step 4), the Period, Ledger Account/Summary and Worktags will populate under Budget Amendment Lines, if not, select them now.

Note: Always select the **Award Performance Period** for the Period.



Entry Type (empty)

Balanced Amendment ☒

Enter changes to original

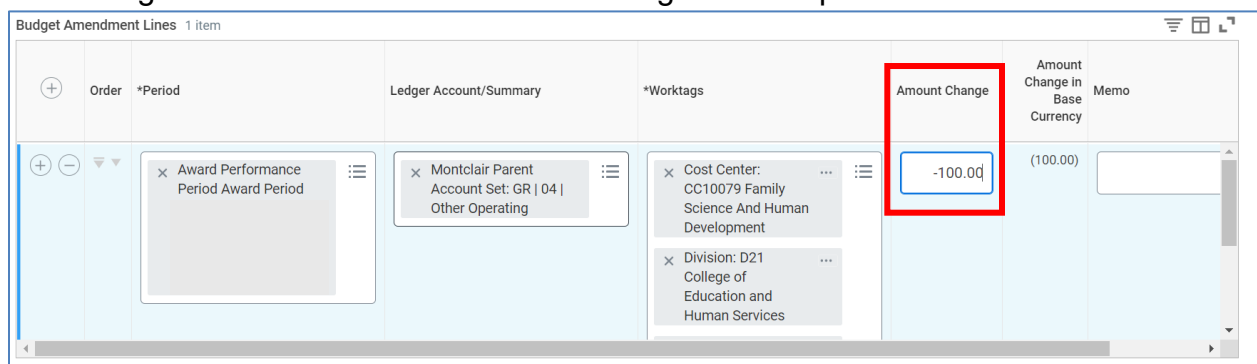
☐ Award Performance Period
 Award Period (AWD-

Budget Amendment

☐ Closeout Award Period

Order	Ledger Account/Summary	*Worktags	Amount Change	Amount Change in Base Currency	Memo
			0.00	0.00	

9) Enter the amount in the **Amount Change** field - to decrease the budget enter a negative amount or to increase the budget enter a positive amount.



Budget Amendment Lines 1 item

Order	*Period	Ledger Account/Summary	*Worktags	Amount Change	Amount Change in Base Currency	Memo
	x Award Performance Period Award Period	x Montclair Parent Account Set: GR 04 Other Operating	x Cost Center: CC10079 Family Science And Human Development x Division: D21 College of Education and Human Services	-100.00	(100.00)	

10) Enter the reason for the transfer in the **Memo** field.

Budget Amendment Lines 1 item

Order	*Period	Ledger Account/Summary	*Worktags	Amount Change	Amount Change in Base Currency	Memo	
+	-	x Award Performance Period Award Period (AWD-00000208: Global Partnerships for Advancing Character Progra 01/01/2018 (version 0))	x Montclair Parent Account Set: GR 04 Other Operating	x Cost Center: CC10079 Family Science And Human Development	-100.00	(100.00)	
			x Division: D21 College of Education and Human Services				

11) Attach all back up documentation through the **Attachments** tab on the screen, to justify the transfer.

12) Click the **Submit** button to send the amendment to the Award Contract Specialist for Approval.