

Create Budget Amendment for Organization

This Quick Reference Guide (QRG) is designed to walk a **Grant Manager** through the creation of a Budget Amendment. This process gives departments the ability to amend award budgets within a Grant. The Grant Manager initiating the budget amendment request will need to be assigned a Grant role. The Grant budget amendment will allow the Grant Manager to move budgets between object classes associated with spend categories, resulting in net zero budget change within the Grant.

Procedure

On the Workday **Home** screen:

1. Type **Create Budget Amendment for Organization** in the search field.
2. Select **Create Budget Amendment for Organization** task from the search results.

On **Create Budget Amendment for Organization** screen:

3. In the **Organization** field, type the **Grant number**.
4. In the **Plan Structure** field, type **Award Budget**.
5. Select the **Company** from the drop-down list.
6. In the **Plan Name** field, type the **Award number**.
7. In the **Worktags** field, type the **Grant number**.
8. In the **Plan Period** field, select **Current Period** (or **Conversion Period**).



The Ledger Account/Summary field can be left blank

9. Click **OK**.


On the second **Create Budget Amendment for Organization** screen, the details of the selected award will display automatically.

10. Enter **Amendment Date**. This field auto-populates and should not be changed.
11. Type a **Description**.
12. Select **Award Budget Amendment** from the **Amendment Type** field.

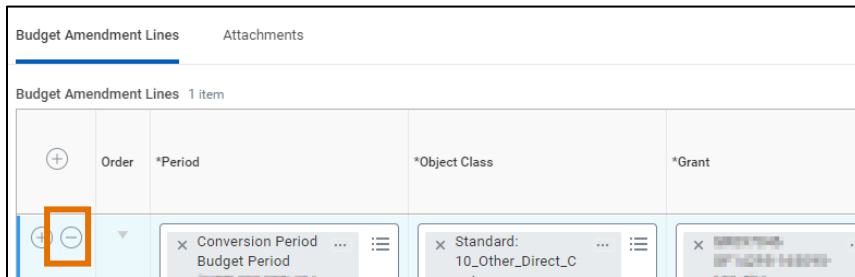


The **Balanced Amendment** checkbox is selected and cannot be deselected. You cannot submit a budget amendment that is not balanced. A **Balanced Amendment** means that the net **Amount Change** in all the budget amendment lines adds up to \$0.


Under the **Budget Amendment Lines** tab:

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|  NOTE | All the Grant Budget lines appear, allowing you to view the current grant budget. |
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13. Select the (-) sign to remove any grant budget lines you are not amending.




14. Enter **Amount Change** on the first line. If you are adding amount to the budget, type the amount. If you are reducing amount from the budget, use a (-) sign before the amount.


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|  NOTE | It is advisable to type a memo for the budget amendment line to be able to reference it easily in the future. |
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15. Repeat step 14 as necessary to complete all budget line changes.

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|  NOTE | If you need to add an object class that does not already have a budget line, select the (+) sign to add a new line. This line will not auto-populate. You will need to select the Period and Grant (same as line you are moving budget from). You can then select the Object Class . Enter the Amount Change as you did in step 14. |
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|  NOTE | You will get an error if you do not have a balanced amendment. A Balanced Amendment means that the net Amount Change in all the budget amendment lines adds up to \$0. |
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16. Click **Submit**.

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|  CAUTION | Do NOT select Save for Later . This option does not work for Grant Managers. You will NOT be able to retrieve what you saved. |
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You have successfully completed the task. It will now be routed based on the workflow.