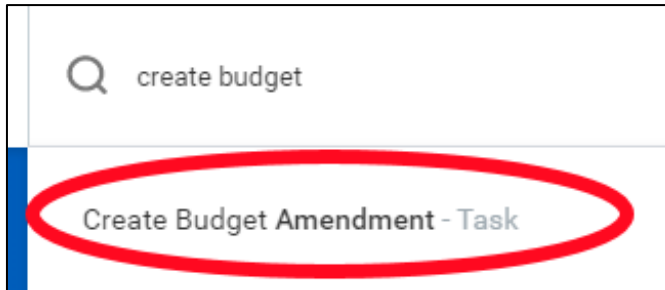


Create Budget Amendment

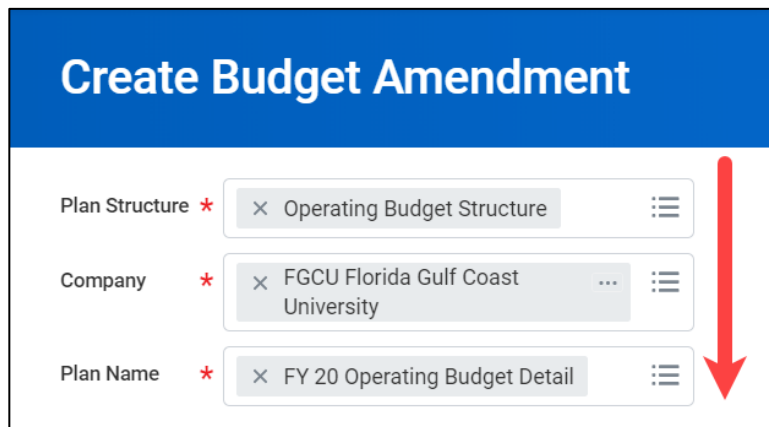
A **Budget Amendment** is any change to an original/approved Budget within Workday.

CREATE BUDGET AMENDMENT

1. From the **Workday Home Page**, enter **Create Budget Amendment** into the *Search* field and select the **Task** from the search results.



2. From the *Create Budget Amendment* screen, enter the following information:
 - **Plan Structure:** Select **Operating Budget Structure**. Note: Should ONLY select this as the Plan Structure; do not use any of the other options available.
 - **Company:** Select **FGCU Florida Gulf Coast University**.
 - **Plan Name:** Select **FY 20 Operating Budget Detail**.



A screenshot of the 'Create Budget Amendment' form. The form has a blue header with the title 'Create Budget Amendment'. Below the header, there are three dropdown menus. The first dropdown is labeled 'Plan Structure' and has 'Operating Budget Structure' selected. The second dropdown is labeled 'Company' and has 'FGCU Florida Gulf Coast University' selected. The third dropdown is labeled 'Plan Name' and has 'FY 20 Operating Budget Detail' selected. A red arrow points down from the right side of the form.

3. Click **OK**.



4. Complete the required fields:

- **Amendment Date:** The date of creation for the Budget Amendment. Defaults to the today's date-do not change.
- **Description:** Enter a brief description of what is being transferred..
- **Amendment Type:** Select **Permanent Amendment** or **Temporary Amendment**.

A screenshot of a form with three fields: 'Amendment Date' with a date picker set to 04/23/2020, 'Description' with an empty text box, and 'Amendment Type' with a dropdown menu icon.

5. Scroll down toward the bottom of the page to view/complete **Budget Amendment Lines**.

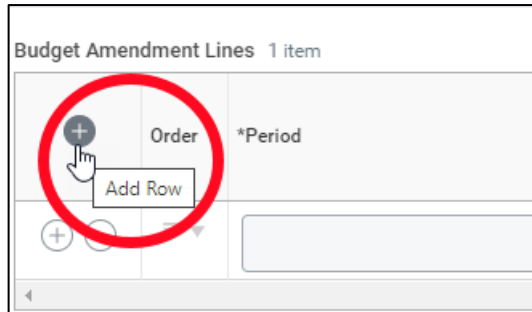
A screenshot of a table titled 'Budget Amendment Lines' with a sub-header 'Attachments'. The table has columns for '+', 'Order', '*Period', 'Ledger Account/Summary', and '*Work'. A red arrow points to the right along the bottom of the table, indicating scrolling.

6. Enter the following information for funds being transferred/removed:

- **Period:** Select the **Period** (FY20 Annual)
- **Ledger Account/Summary:** Type in **Pool** and Select the Budget Pool Account.
- **Worktags:** Search for Activity (for example typing “advising” will pull up all worktags related to advising).
- **Curent Plan Amount:** Current budget in that parricular Budget Pool/Ledger Account select.
- **Current Spend:** Actual expenditures or Activity out of the account would appear here.
- **Remaining Plan:** The current plan amount minus the current spend. The true budget balance before making any changes to the line.
- **Percentage Change:** Enter % of change. **Note: Either use percentage change, amount change OR total plan.*
- **Amount Change:** Enter flat amount change. **Note: Either use percentage change, amount change OR total plan.*

- **Total Plan:** Adjust total plan amount. * **Note:** *Either use percentage change, amount change OR total plan.*
- **Memo:** Description of specific line of activity (for example: Surplus chargebacks from vacant office phone line). This field is optional.

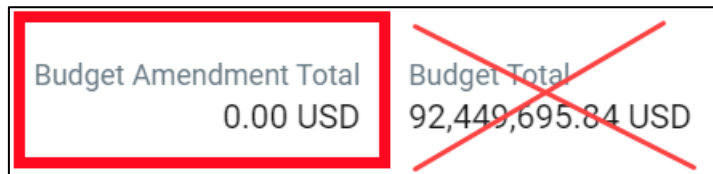
7. Click the Add button to add an additional line to balance out the previous line.



8. Repeat Step 6 by entering the required information for funds destination.

9. Scroll back up to the top of the screen. To the right is the **Budget Amendment Total** after information is entered the total will adjust. This should always be ZERO when transferring E&G dollars before submitting the budget amendment & can be used to assist with balancing out the budget lines. IF you are submitting an unbalanced auxiliary increase or decrease then you will see your Budget Amendment total.

***Note:** Please **IGNORE** the Budget Total.



10. If there are additional line items, repeat steps 6-9. Once all line items have been entered, select **Submit**.

***Note:** If you select the **Save for Later** option, you can access the saved version by entering **Find Budget Amendments** in the Search field. If the **Cancel** option is selected it will cancel out the process entirely.



11. The **Budget Amendment** is routed to appropriate personnel for Approval.