

# Budget Modification Step-by-Step Instructions

## New Budget Modification

Select Budget Cycle: Default value is the current budget cycle.  
By selecting a different budget cycle, you can view historical information.

Select Agency: Default value as defined by the User in User Options.  
User may Select any Agency that has been assigned to them.

Select Version: Default value as defined by the User in User Options.  
User may Select any Version that has been assigned to them.

Select Modification: To create a new Modification, User will need to select "NEW".  
Will put screen into Edit Mode.

### Modification Narrative tab

Modification Title: Enter a short title for the Modification.

Click Save Save information entered.

Click Cancel Return the User to View mode.

To begin entering details on a Budget Modification, see Update Existing Budget Modification section.

# Budget Modification Step-by-Step Instructions

## Update Existing Budget Modification

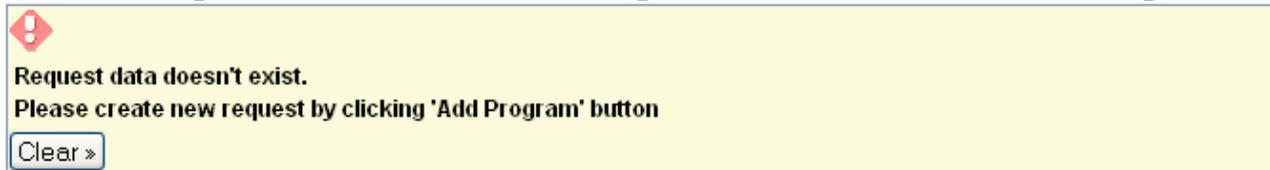
- Select Budget Cycle: Default value is the current budget cycle.  
By selecting a different budget cycle, you can view historical information.
- Select Agency: Default value as defined by the User in User Options.  
User may Select any Agency that has been assigned to them.
- Select Version: Default value as defined by the User in User Options.  
User may Select any Version that has been assigned to them.
- Select Modification: To create a new Modification, User will need to select "NEW".  
Will put screen into Edit Mode.
- Click Edit: Enter Edit Mode.

### ***Narrative tab***

- Active Tabs: Click on a tab name to bring up a Narrative sub-section and enter required information.  
See instructions on Narratives for details on how to enter information.

### ***Request tab***

**Note: If no Programs have been entered for a Budget Modification, the screen the following screen:**



- Click on Add Program:
- Select Program: Only programs assigned to User will be displayed.  
If program not found, contact your Budget Analyst to have one created.
- Select Subprogram: User should choice a Subprogram from the list.  
**NOTE:** Adding a Program will place the screen into New mode.
- If at least one Program has been entered for the Budget Modification, User may select from the summary.
- Click Edit: If screen is not in New or Edit mode already.  
Allows User to enter data.
- Information is entered into 3 sub-sections: **Permanent Salaries, Request, and Funding.**

# Budget Modification Step-by-Step Instructions

## Update Existing Budget Modification

### Permanent Salaries sub-section

Enter Job Code: If known, enter Job Code and click on Add Job Code.

OR

Search Job Code: Allows User to search for a Job Code.

User may search for Job Code using the following criteria:

Enter the Job Code

Search will look for Job Codes that begin with what has been entered.

Enter part of the Job Title

Will within the Job Title the character entered.

Enter a Grade

Will search all Job Codes that match the Grade entered..

Combination of all three above.

Search will use criteria from all three areas.

Click the box by each Job Code to be added.

Multiple Job Codes may be added at the same time.

Click Submit

Will return User to previous screen with selected Job Code(s).

Click Cancel

Will return User to previous screen without selected Job Code(s).

Enter information for both FTE and Salary amounts for all years of the budget cycle.

**NOTE:** When a Job Code is added for the first time, the system will automatically add certain object codes that are generally related to salaries in the Request sub-section. These lines maybe deleted at by the User.

### Request sub-section

Object Code: Enter Object Code and click Add Object Code.

If Object Code not found, User will receive an error message.

OR

Search Object Code: Allows User to search for an Object Code.

User may search for Object Codes using the following criteria:

Enter the Object Code

Search will look for Object Codes that begin with what has been entered.

Enter part of the Object Description

Search within the Object Description the character entered.

Combination of the two above.

Search will use criteria from all above.

Click the box by each Object Code to be added.

Multiple Object Codes may be added at the same time.

Click Submit

Will return User to previous screen with selected Object Code(s).

Click Cancel

Will return User to previous screen with out selected Object Code(s).

Enter data as needed to in appropriate fields.

### Funding sub-section

Funding data must be entered for Operations and Government Aid.

Data may be entered in two different ways.

User may enter a Funding Mix percentage for each fund type,

System will calculate the actual dollar amount.

User may enter dollar amount for each fund type.

System will calculate the actual Funding Mix percentage.

User must ensure that Funding equals amounts entered above.

## Budget Modification Step-by-Step Instructions

### Update Existing Budget Modification

Click Save button: Save all data entered.

#### **Other Buttons on Screen**

Refresh: Update totals but does not Save data.

Cancel: Return User to View mode.  
Any unsaved information will be lost.  
Must click to add a new project or edit a different project.

Click Trash Can icon to delete a row.  
If historical data exists, even if not displayed, a Trash Can will not appear.

#### ***Summary tab***

This tab details all Budget Modifications and provides the User with a variance to what is required to be identified.