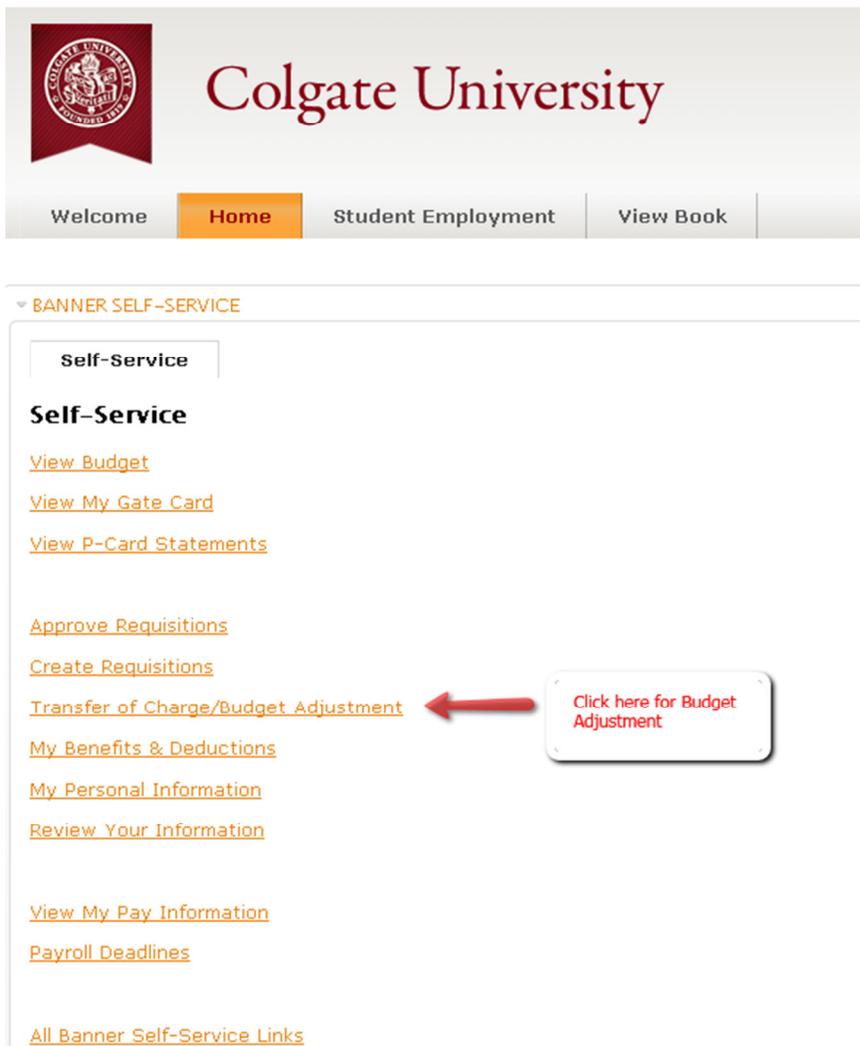


Budget Adjustments

The online budget adjustment form is to be used for temporary (current year only) budget adjustments. Please contact the budget office if you need to make a permanent (current year and beyond) budget adjustment or any adjustment related to salary and compensation. Budget Adjustments only move budgeted dollars, not actual charges. Please see the “Transfer of Charges” instructions to move actual charges to a different account or org.

1. Log into the portal.
2. Click on the “Transfer of Charge/Budget Adjustment” link.



Colgate University

Welcome Home Student Employment View Book

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Self-Service

Self-Service

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Click here for Budget Adjustment

3. This will open the “Transfer of Charge/Budget Adjustment” form.
4. Enter Transaction date. Please note that the transaction date must be in the current month.

Note: If you are adjusting the budget of an unrestricted fund (100000), do NOT enter the fund number; just enter the org number.

If you are adjusting the budget of a restricted fund (2xxxxx), enter the fund number but do NOT enter the org.

11. Enter the account you want to decrease. Any accounts under 200 (salary and compensation) will need to be entered by the Budget office. If you are decreasing more than one fund/org/account, enter each entry must be on an individual line.

12. The "Credit/Decrease" section amounts must equal the "Charge/Increase" section.

13. Click the "Complete" button.

JV Description

Explanation

CREDIT/ DECREASE:	Fund (6 digit)	Orgn (5 digit)	Account	Amount
		45050	316	100
			TOTAL	.00

14. If you receive an error, the message will tell you what line the error is on. Lines 1-5 are in the "Charge/Increase" section; lines 6-10 are in the "Credit/Decrease" section.

15. You will receive a copy of the budget adjustment for your records via email.