



Enter a budget adjustment request

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Enter a budget adjustment request

[Grants and Projects > Maintenance > Member Grants > Grant Maintenance](#)

A budget adjustment is used to add or subtract an amount from an object's total award. To create a budget adjustment request, click **Budget Adjustment** from the top of the page.

The screenshot shows the 'Grant Maintenance' page. At the top, there is a green header bar with a home icon, the text 'Maintenance > Member Grants', and a dropdown menu labeled 'Grants And Projects'. Below the header, there are four buttons: 'Save', 'Budget Adjustment' (highlighted with a black arrow), 'Budget Revision', and 'Reimbursement'. Under these buttons, there are input fields for 'Year' (set to 20) and 'Grant ID' (EEGRID81), along with 'Retrieve', 'Directory', and 'Documents' buttons. Below this is a section with two tabs: 'GRANT MAINTENANCE' (selected) and 'OBJECT MAINTENANCE'. Under 'GRANT MAINTENANCE', there are input fields for 'Year' (20), 'Grant ID' (EEGRID81), 'Member' (654321 : ASCENDER Academy), 'Status' (Active), and 'Grant Type' (GRNT : Grant Type).

The Budget Adjustment pop-window opens allowing you to add the request.

The screenshot shows the 'Budget Adjustment Request' pop-window. At the top, it displays 'Year: 20 - Grant ID: EEGRID81 - Member: 654321 : ASCENDER Academy' and a close button (X). Below this are 'Save', 'Submit', and 'Cancel' buttons. The window is divided into three main sections: 'Dates', 'Reserve', and 'Final Report'.
 - **Dates:** Begin Date: 10-11-20, End Date: 10-11-20.
 - **Reserve:** Reserved Percent: 0%, Reserved Amount: 0.00.
 - **Final Report:** Due Date: 10-14-20, Processed Indicator: ☐.
 Below these is a 'Summary' section showing:
 - Total Award: 16,500.00, Eligible Remaining: 16,500.00
 - Reimbursements: 0.00, Matching Funds: 0.00
 - Pending Reimbursements: 0.00
 The bottom section is titled 'Budget Adjustment Request' and contains a table with the following columns: Object, Total Award, Adjustment Amount, Reimbursements, Pending Reimbursements, Eligible Remaining, and Matching Funds. The 'Adjustment Amount' column for the first row (61XX) is circled in black.

Object	Total Award	Adjustment Amount	Reimbursements	Pending Reimbursements	Eligible Remaining	Matching Funds
61XX	5,000.00	500.00	0.00	0.00	5,000.00	0.00
62XX	5,000.00	0.00	0.00	0.00	5,000.00	0.00
63XX	500.00	0.00	0.00	0.00	500.00	0.00
64XX	500.00	0.00	0.00	0.00	500.00	0.00
65XX	500.00	0.00	0.00	0.00	500.00	0.00
66XX	5,000.00	0.00	0.00	0.00	5,000.00	0.00
Total:	16,500.00	500.00	0.00	0.00	16,500.00	0.00

The transaction date and status are displayed.

Review the budget data, indicate the adjustment amount, and save or submit the request.

Object	Displays a list of the six predefined object classes for each year and grant ID: 61XX, 62XX, 63XX, 64XX, 65XX, and 66XX.
Total Award	Displays the total award amount for the corresponding object class, which includes the original amount of the award plus or minus any revisions that have been approved (posted).
Adjustment Amount	Type the applicable budget adjustment amounts. Amounts can be negative (-) or positive values. A budget adjustment is used to add or subtract balances from an object's total award.
Reimbursements	Displays the reimbursement amounts that have been paid.
Pending Reimbursements	Displays the pending reimbursement amounts that have been approved but not paid.
Eligible Remaining	Displays the eligible remaining amount of the award (calculated Total Award - Reimbursements and Pending Reimbursements = Eligible Remaining).
Matching Funds	Displays the total amount of matching funds.
Total	Displays the totals for each column.


☐ Click **Save** to save the request without submitting it for approval.



☐ Click **Submit** to submit the request for approval. The request is forwarded through the designated approval path for the selected grant type.

Once the request is saved or submitted, it is displayed under **Transactions** with the appropriate status.

☐ Click **Cancel** or X to close the pop-up window.

Documents:

Once a request is saved or submitted and if you have access to Document Attachments, click  under **Transactions** to open the Budget Adjustment Request pop-up window.

- Click **Documents** to open the [Document Attachments](#) pop-up window. You can view, upload, or delete documents as needed.
- If documents exist for the request,  is displayed on the **Documents** button.
- If a document is uploaded in this popup,  is displayed for the transaction in the **Doc** column under **Transactions**.

After the budget adjustment request goes through the appropriate approval path and is completely approved, the transaction status changes to *Posted* and the grant amounts are updated accordingly on the Grant Maintenance page under **Summary**.

Summary

Total Award: 17,000.00
Eligible Remaining: 17,000.00

Reimbursements: 0.00
Matching Funds: 0.00

Pending Reimbursements: 0.00

Transactions

Cancel	Trans	Detail	Doc	Date	Type	Status	Budget Amount	Reimbursement Amount	Check Nbr	Payment Date	Final Report
				10-20-20	Budget Adjustment	Posted	500.00	0.00			<input type="checkbox"/>
				10-19-20	Original	Posted	16,500.00	0.00			<input type="checkbox"/>
First				1 : 10-20-20 - 10-19-20			/ 1				Last

Click the spyglass under **Transactions** to open the Budget Adjustment Request pop-up and view the transaction details.

Budget Adjustment Request - Date: 10-20-20 - Status: Posted



Cancel

Documents

Object	Total Award	Adjustment Amount	Reimbursements	Pending Reimbursements	Eligible Remaining	Matching Funds
61XX	5,500.00	500.00	0.00	0.00	5,500.00	0.00
62XX	5,000.00	0.00	0.00	0.00	5,000.00	0.00
63XX	500.00	0.00	0.00	0.00	500.00	0.00
64XX	500.00	0.00	0.00	0.00	500.00	0.00
65XX	500.00	0.00	0.00	0.00	500.00	0.00
66XX	5,000.00	0.00	0.00	0.00	5,000.00	0.00
Total:	17,000.00	500.00	0.00	0.00	17,000.00	0.00



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